

Exhibit A15

Public Redacted Version

EXHIBIT 33

Welcome fellow Googlers

Use this Master Deck to input your slides for the upcoming
Bumble Executive Summit
in MTV on **Oct 12th 2022**

Date: Wednesday 12th October

Time: 08.45 AM PST

Location: MTV [Partner Plex](#) → 1st Floor / Room: [Data Cluster](#)

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bumble



badoo

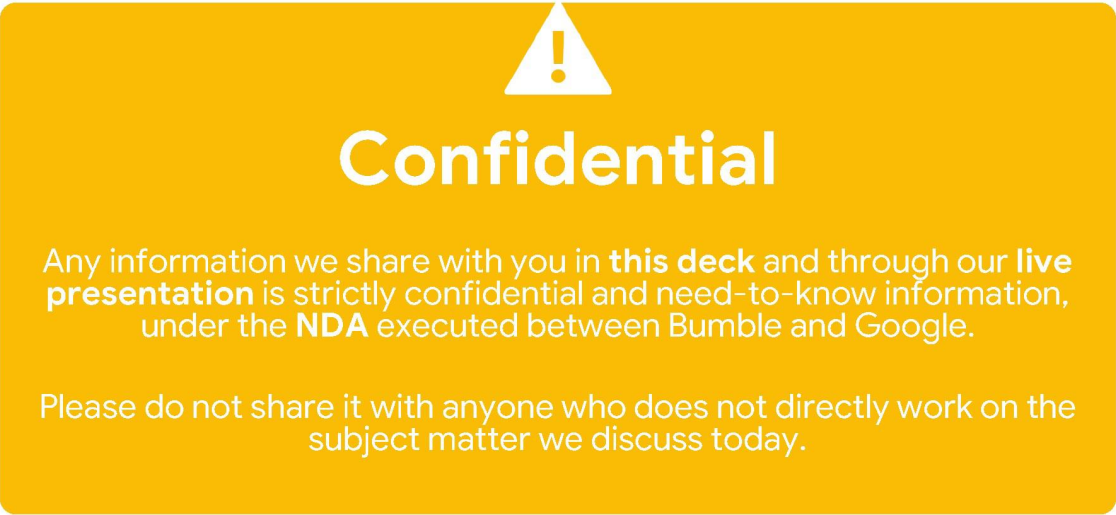


FRUITZ

 Google Play




4 Colour option



Confidential

Any information we share with you in **this deck** and through our **live presentation** is strictly confidential and need-to-know information, under the **NDA** executed between Bumble and Google.

Please do not share it with anyone who does not directly work on the subject matter we discuss today.

 Google Play Proprietary • Confidential

White Option

Agenda

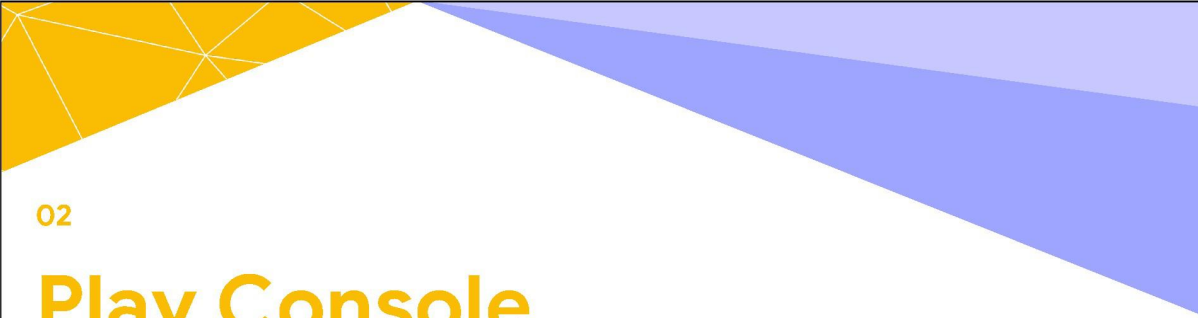
01 ○ **Bumble:** Roadmap & Feedback

02 ○ Play Console (UK-dial in)
○ Play Commerce
○ Growth consultation and Custom insights
○ Investing in form factors
○ Play Store – Increase user engagement

 @12.15


03 ○ Bumble Ads – Google Ads

Dinner at Ozumo
San Francisco
@7.00 PM




02

Play Console



Tom Grinsted
Group Product Manager
Business Success
(He / Him)

 Google Play

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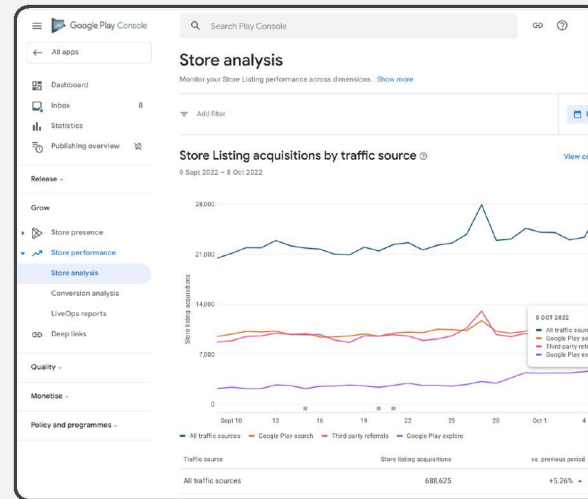
Agenda

- 01 Key changes to acquisition insights
- 02 Custom Store Listings & opportunities
- 03 Quality and discoverability
- 04 Engagement, reactivation, and promotional content

01: Key changes to acquisition insights

Understanding acquisition better

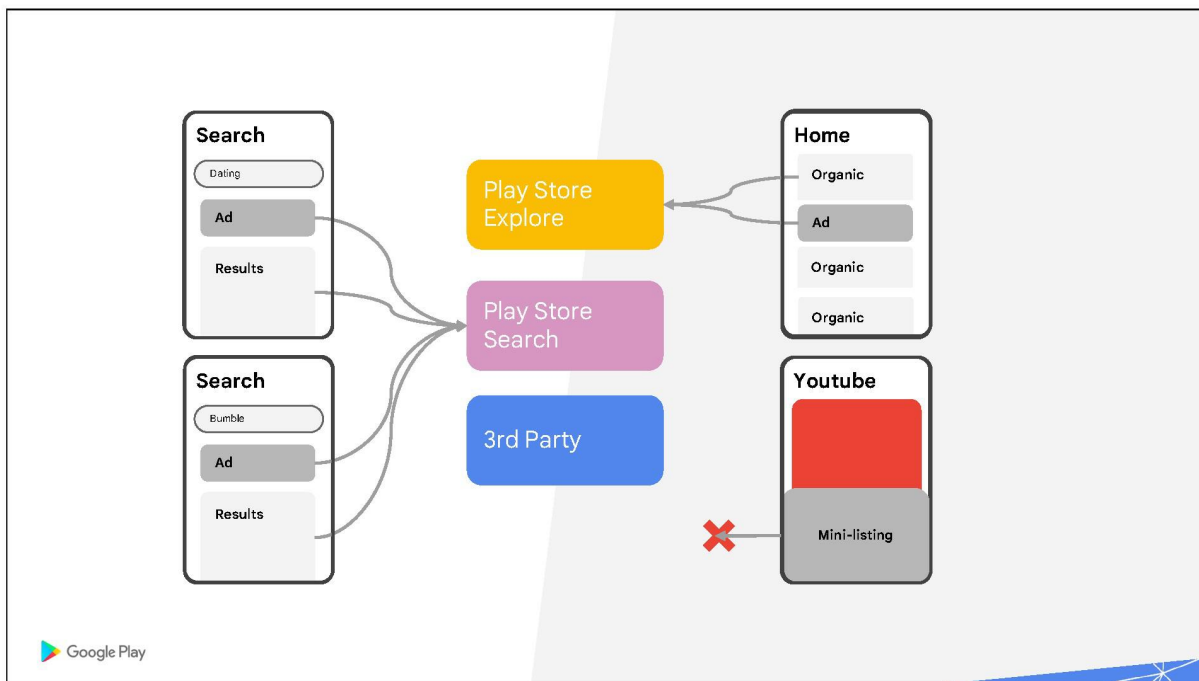
- New attribution to mirror your and your users' **intent**, not just Play surface
- Driving organic optimisation:
 - 'clean' buckets without ads
 - Differentiation between search types
- Increased data coverage



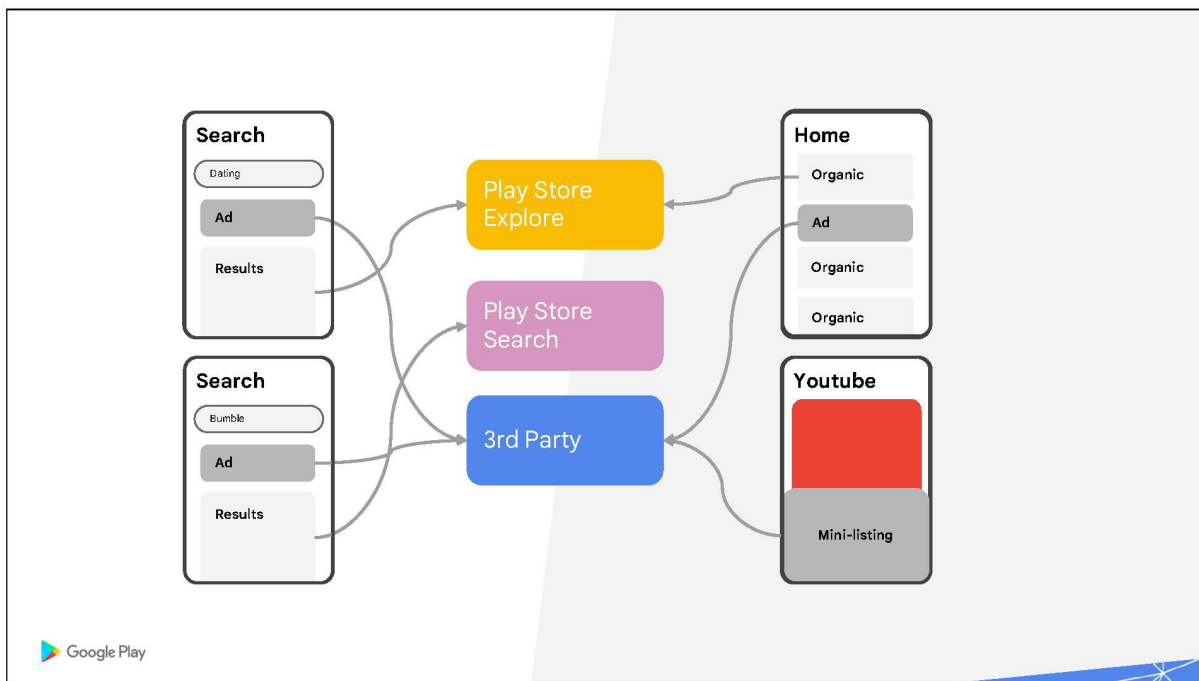
Acquisition insights

COMING NOV

Updates to acquisition insights making it easier to understand your store traffic



Updates to acquisition insights making it easier to understand your store traffic



Updates to acquisition insights making it easier to understand your store traffic

01: Key changes to acquisition insights

Understanding acquisition better

- New attribution to mirror your and your users' **intent**, not just Play surface
- Driving organic optimisation:
 - 'clean' buckets without ads
 - Differentiation between search types
- Increased data coverage

Search terms			Explore search terms		
Search term	Store listing acquisitions	vs. previous period	Search term	Store listing acquisitions	vs. previous period
Bumble	70,009,646	+2.05%	Dating	44,267,073	-0.6%
Bumble dating	26,827,151	+5.19%	Going out	4,129,105	-4.18%
			Tinder	1,360,651	+0%
			Other	1,206,368	+2.57%
			Relationships	831,850	+1.53%

Mock, not real data

Acquisition insights

COMING NOV



Updates to acquisition insights making it easier to understand your store traffic

02: Custom Store Listings & opportunities

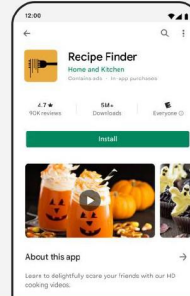
Driving increased acquisitions

- Custom Store Listings already drive better acquisitions
 - Deeplink URLs
 - Country/Language pairs
- Follow users across Google surfaces with listing overlays
- Coming soon:
 - CSLs by ad-groups
 - CSLs for churned users

>3.5%
increase in
MAU

Email marketing
about halloween
specials

Social posts about
Diwali inspiration



Custom store listings

AVAILABLE TODAY*



Updates to acquisition insights making it easier to understand your store traffic

03: Quality and discovery

Quality is foundational

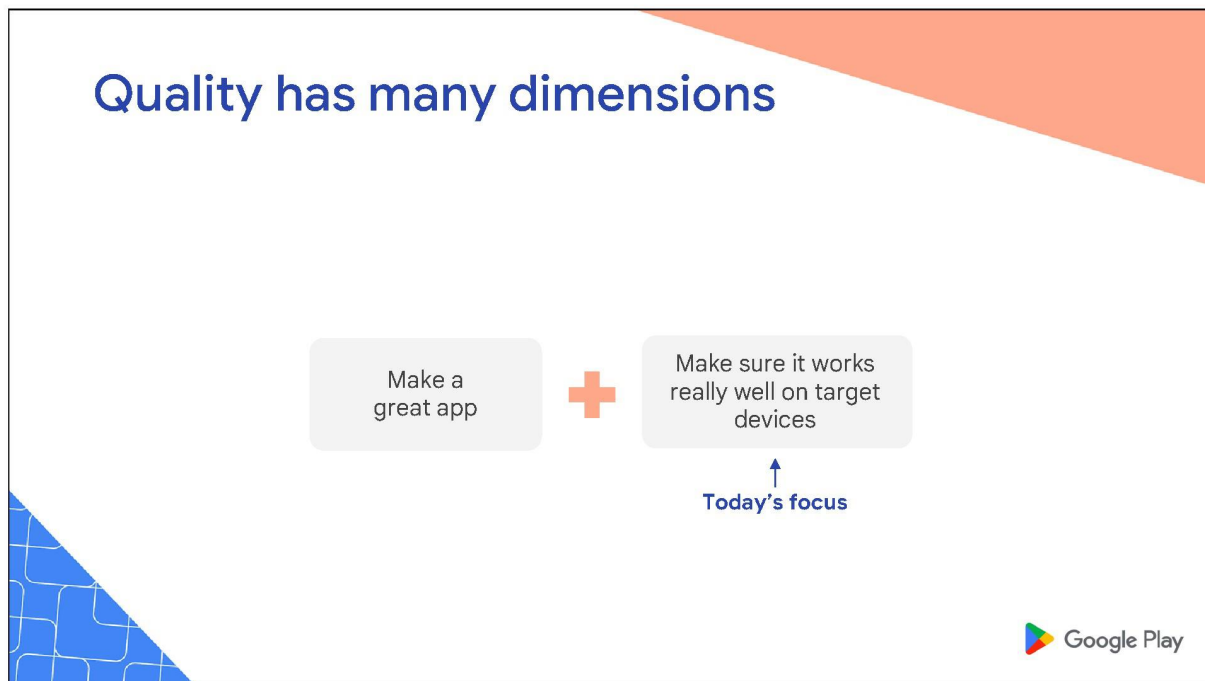
The diagram consists of two light gray rounded rectangular boxes. The left box contains the word "Quality" and the right box contains the words "User visibility". An orange right-pointing triangle is positioned between the two boxes, indicating a flow or relationship from Quality to User visibility.

Quality

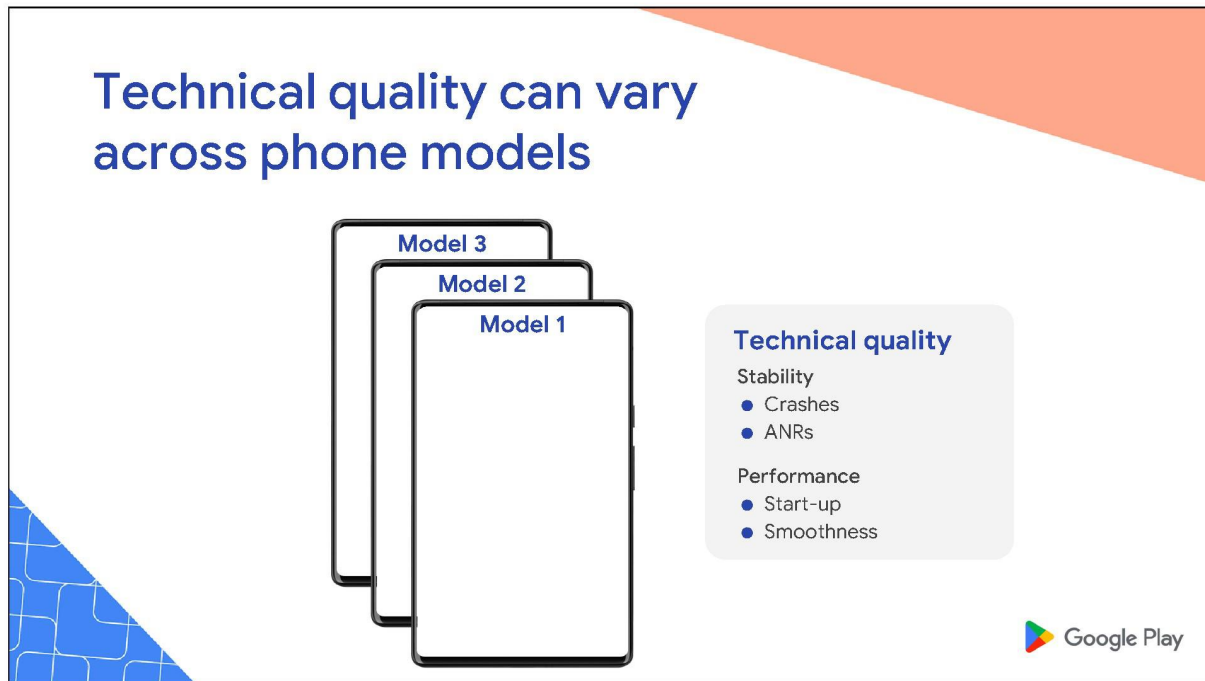
User visibility

The Google Play logo, featuring a colorful triangle icon followed by the text "Google Play".

As you heard from Tom and Andrew, quality is foundational to your success on Google Play. Last week, we announced that Play is investing even more to increase the visibility of higher quality titles on Play. In parallel, Play is also steering users away from lower-quality titles.



Play looks at quality across several dimensions.
Today I want to focus how we think about technical quality



Many aspects of technical quality aren't fixed - for example, users on low RAM devices will potentially experience longer loading times or more ANRs than users on the latest flagship device.

Previous Play has only measured technical quality in aggregate: we grouped statistics from all users across all devices, into a single number.

But as everyone who has worked with distributions will know, if you collapse a distribution into a single number, you lose your understanding of what's happening at the individual user level.



Every user matters on Play, so the key change we have made is to start thinking about technical quality in a more user-focused way, at the device level. This means that we can make better recommendations to individual users, which in turn means better outcomes for developers who deliver good experiences, and a better perception of Android and Play overall.

Our definition of technical quality uses more user-focused metrics

New core vitals	
User-perceived crash rate	% daily active users who experienced ≥ 1 crash that is likely to have been noticeable (e.g. in the foreground)
User-perceived ANR rate	% daily active users who experienced ≥ 1 ANR that is likely to have been noticeable (e.g. after user input)



We're also replacing the existing core vitals crash and ANR rate metrics, with new user-perceived versions of these metrics. Previously we considered all crashes and ANRs when evaluating your app's stability. Now we are focusing on only the subset that we believe are most visible to users. We believe these are a better reflection of user experience; and we've seen a stronger correlation to uninstalls. There's an additional benefit to you which is that the ANRs we're focusing on are input timeout ANRs more likely to have a stack trace, making them easier to fix.

We now have a bad behavior threshold per phone model, as well as overall

Overall quality	
User-perceived crash rate	1.09%
User-perceived ANR rate	0.47%



Lower visibility on all devices



We've always had an overall bad behavior threshold in Android vitals, for both crash and ANR rates. This sets a general bar for what we seem to be acceptable quality. Our overall threshold remains unchanged, but will now be evaluated on the new user-perceived metrics.

We now have a bad behavior threshold per phone model, as well as overall

	Overall quality	Per-phone quality
User-perceived crash rate	1.09%	8%
User-perceived ANR rate	0.47%	8%

↑
Lower visibility on all devices

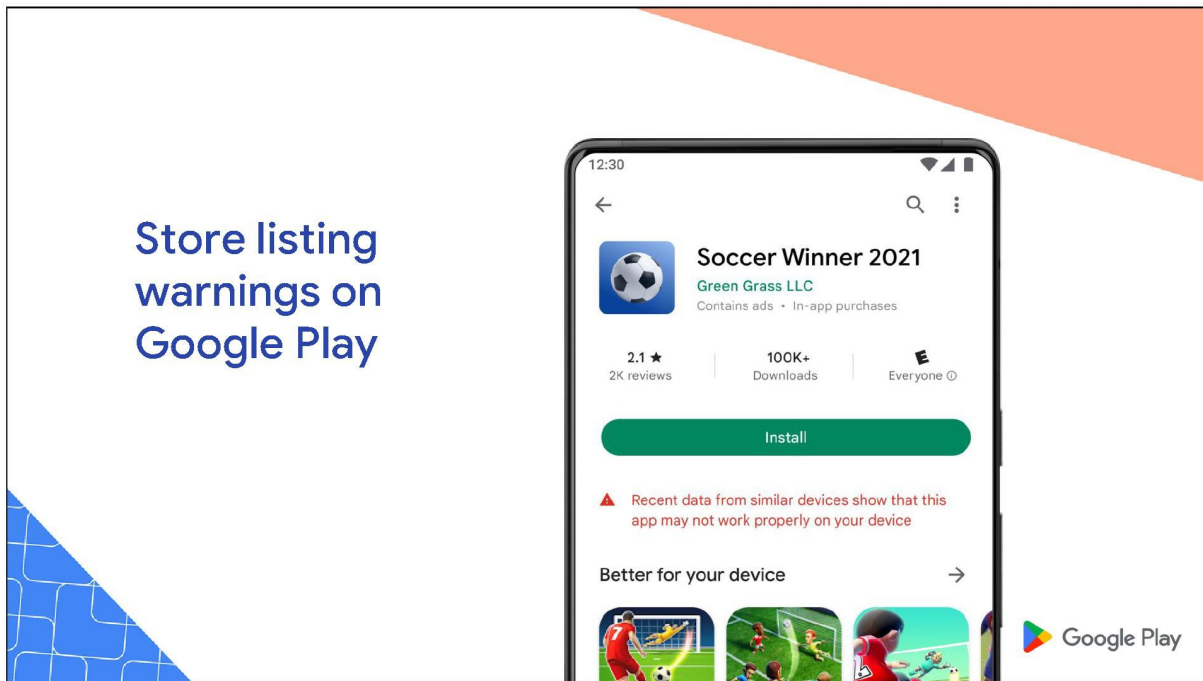
↑
Lower visibility on those phones
A warning may be displayed on
store listing



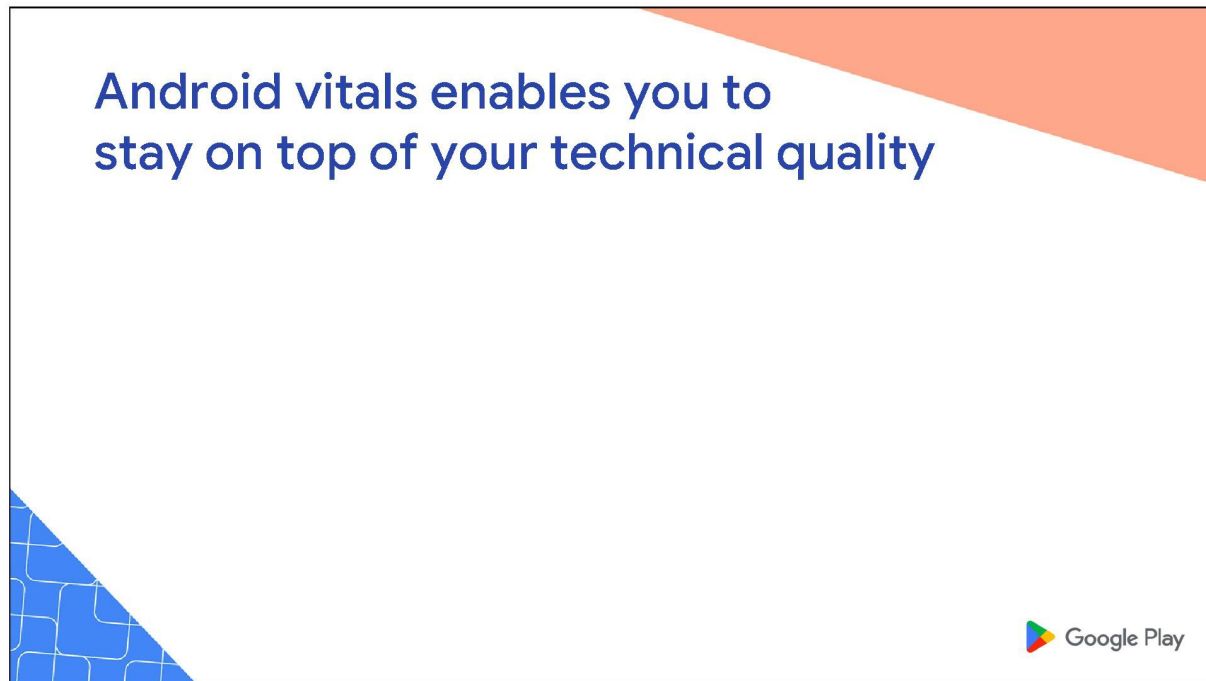
Now we're defining an additional threshold that is measured on a per device basis, for phones.

This also affects your discoverability on store, on those phones.

If your title exceeds device BBT on any core vital, for a given device model, then Play may reduce the visibility of your title for users on that device model, and steer them towards higher quality alternatives.

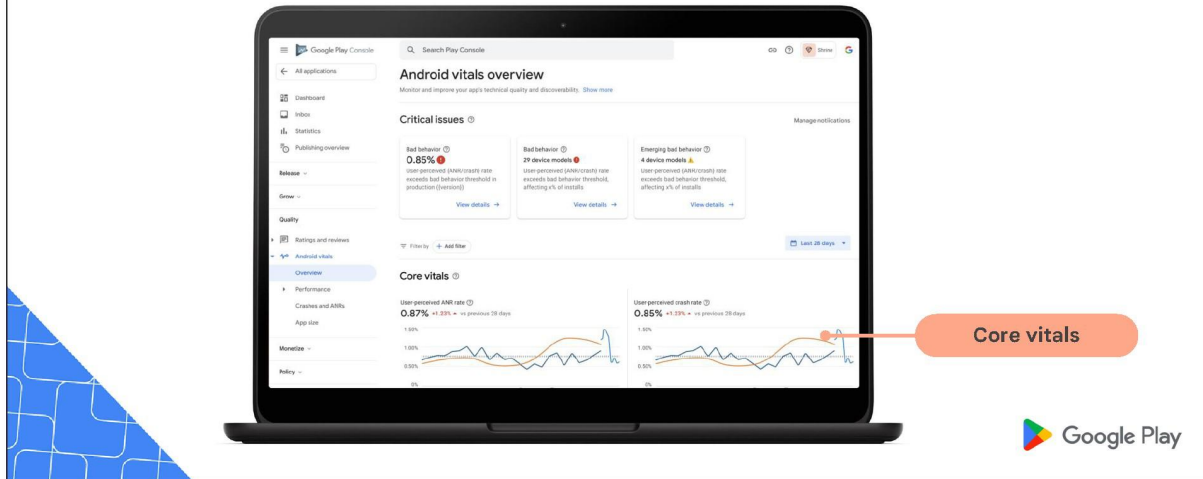


In some cases, we will show a warning on your store listing that sets user expectations that the title may not perform well for them, and gives them the opportunity to consider a higher quality alternative. We will generally look at the last 28 days of data when evaluating your quality, but may act sooner if we detect a spike.



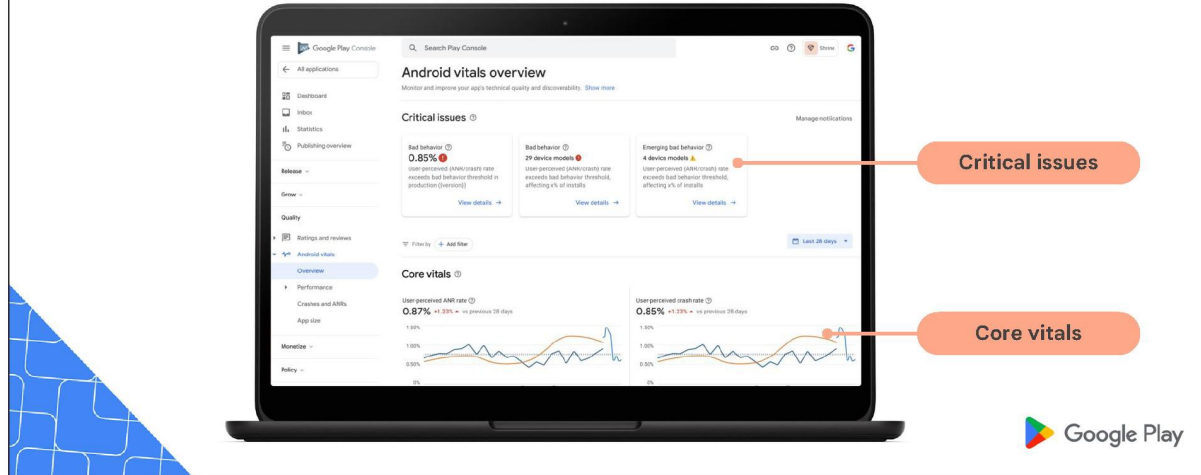
To help you meet these new quality guidelines, we've launched a number of new features in Android vitals to make it easier to monitor and act on any issues.

Android vitals enables you to stay on top of your technical quality

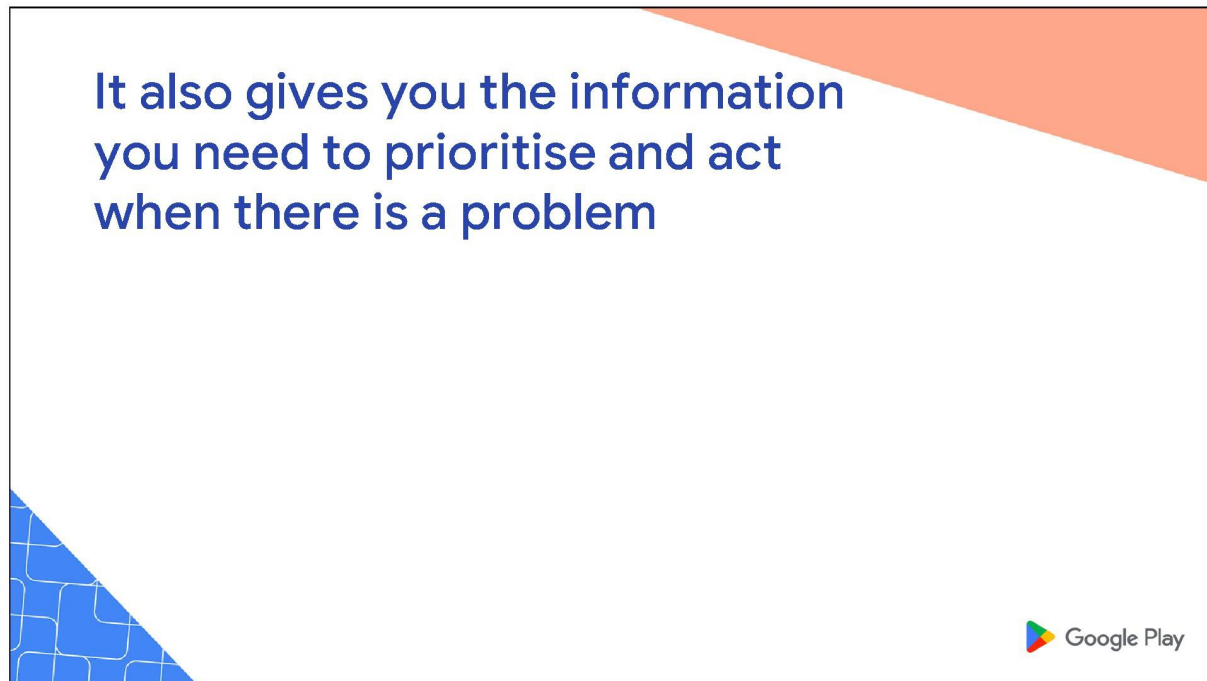


To start with, you can see the new metrics in Android vitals, in the Console UI or using the Play Developer Reporting API.

Android vitals enables you to stay on top of your technical quality



To start with, you can see the new metrics in Android vitals, in the Console UI or using the Play Developer Reporting API. And when you miss a threshold either overall or on a device, Android vitals will tell you and give you a measure of the impact.



Once you know there is an issue, or that you may be heading towards one, you can also use Vitals to narrow down the problem

It also gives you the information
you need to prioritise and act
when there is a problem

Device

Bad behavior on 29 device models ● Affecting (x% of installs / x% of active users)

Emerging bad behavior on 4 device models ▲ Affecting (x% of installs / x% of active users)

Display: All devices All devices Devices with bad behaviors only

Device	Affected sessions (#)	Affected sessions (%)	Total sessions	without crashes
samsung o1s (Galaxy S21 5G) ● Bad behavior	~5k	5.3%	~5k	98.5% →
samsung a51 (Galaxy A51) ●	~4k	0.8%	~5k	98.5% →
OnePlus OP515BL1 (OnePlus 9 Pro) ●	~3k	2.8%	~5k	98.5% →
xiaomi ginkgo (Redmi Note 8) ●	~2k	6.1%	~5k	98.5% →
Redmi begonia (Redmi Note 9 Pro) ▲ Emerging bad behavior	~1k	5.8%	~5k	98.5% →

We've detected that your user-named/crash/ANR/crash or

Rows per page: 5 1-5 of 50 < >

Device models



For example, you can see all the device models which are missing the device threshold over a 28 day period, and identify ones that are on track to do so

It also gives you the information
you need to prioritise and act
when there is a problem

Device context

Device

Bad behavior on 29 device models
Affecting (x% of installs / x% of active users)

Emerging bad behavior on 4 device models
Affecting (x% of installs / x% of active users)

Display: All devices ▾

All devices

Devices with bad behaviors only

Device	Affected sessions (#)	Affected sessions (%)	Total sessions	without crashes
samsung o1s (Galaxy S21 5G) Bad behavior	~5k	5.3%	~5k	98.5%
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Redmi begonia (Redmi Note 9 Pro) Emerging bad behavior	~1k	5.8%	~5k	98.5%

We've detected that your user-perceived `crash/ANR/crash or ANR` is high for the device `Redmi begonia (Redmi Note 9 Pro)`. We recommend you to check the logs for this device.

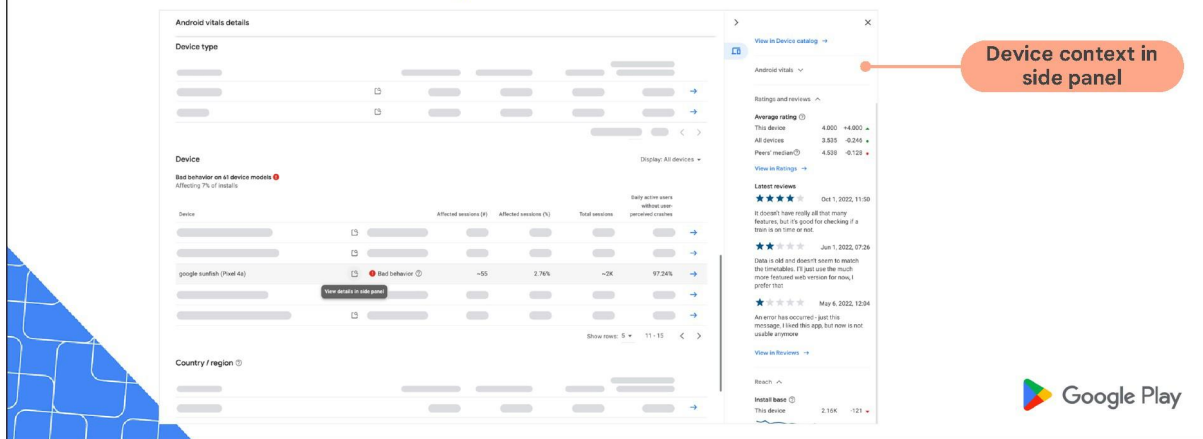
Rows per page: 5 × 1-5 of 50

We've detected that your user-
name was in crash/ANR/crash nr.



Another feature we've built is a new side panel to show device information in context
With one click

It also gives you the information
you need to prioritise and act
when there is a problem



You can bring up consolidated information about the device model you're looking at, without leaving the page - so for example, the ratings and reviews, your install base, also the most common crash or ANR clusters, and how this device compares not only with your app's overall performance, but also how it compares to peers
And actually you can get this information for any hardware or software slice of the ecosystem, not just device model - Android version, RAM etc



So i've talked about how quality is foundational, how it drives your app's visibility, and explained Play's new definition of technical quality

Over time we do plan to reduce the per-phone thresholds down from 8%, as mentioned in the blogpost, and we will start to consider other aspects of technical quality like performance, when evaluating technical quality.

Next steps

- Use Android vitals in Play Console, or integrate with the reporting API
- Ensure the relevant people have access to Android vitals
- When prioritizing technical issues to address, consider the impact on both existing users and new users



But for now, my recommendation is to focus on stability. Ensure you have someone accountable for monitoring your technical quality on Play.

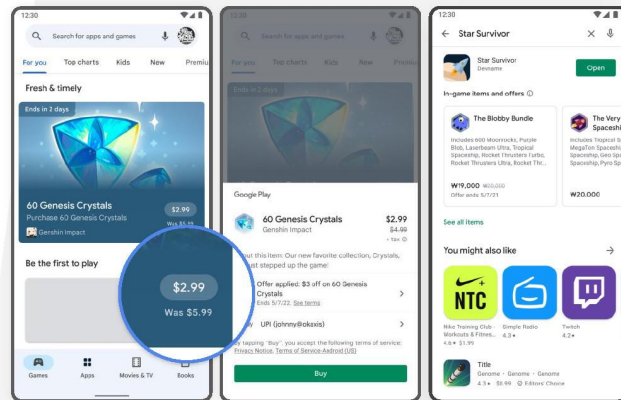
We launched the reporting API to make it easier for those of you who would prefer to do this in your own workflows, and we will continue to maintain and extend this API over time.

Finally, do ensure you take a holistic approach when evaluating the opportunity here, and comparing it to other areas where you could be spending your time and engineering resource.

04. Engagement, reactivation, and promotional content

More, and more personal, content & opportunities across Play

- Direct marketing
 - Subs coming 2023
- User-tag personalisation
 - Target promotional content across Play to tags that you set

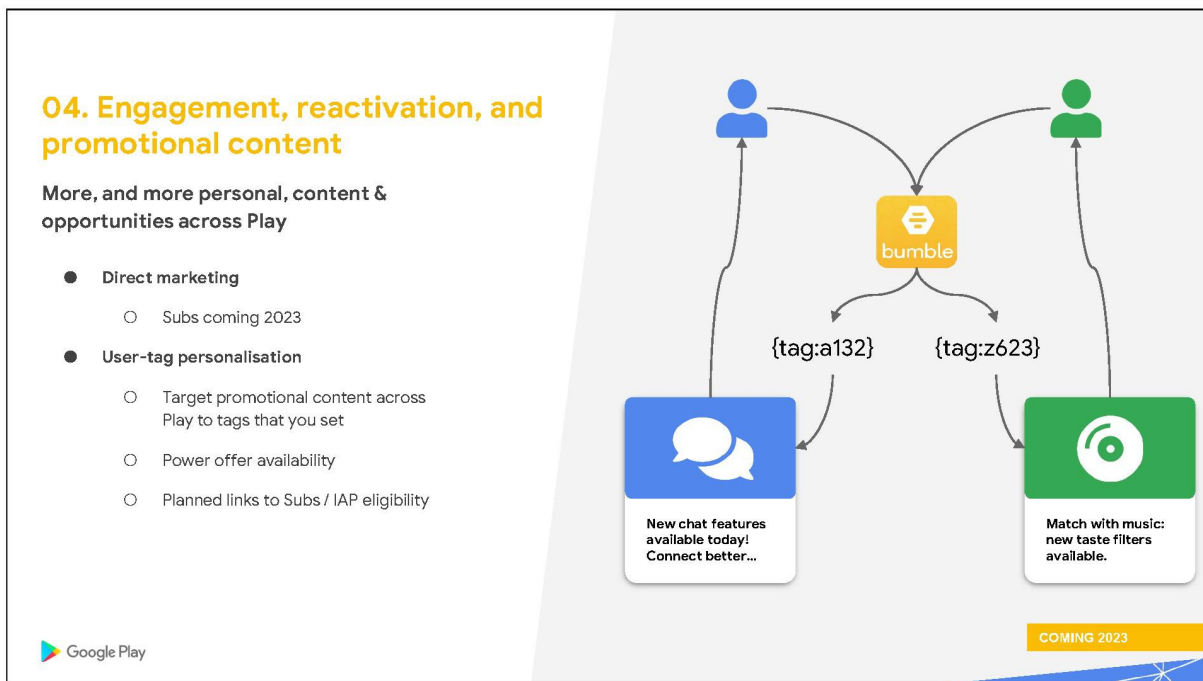


Direct offer marketing

COMING 2023




Updates to acquisition insights making it easier to understand your store traffic




Updates to acquisition insights making it easier to understand your store traffic

02


Play Commerce




Mrinalini Loew
Director, Product Management
(She / Her)



Paul Feng
Director, Product Management
(He / Him)



Austin Shoemaker
Director, Product Management
(He / Him)

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What is Play Commerce?

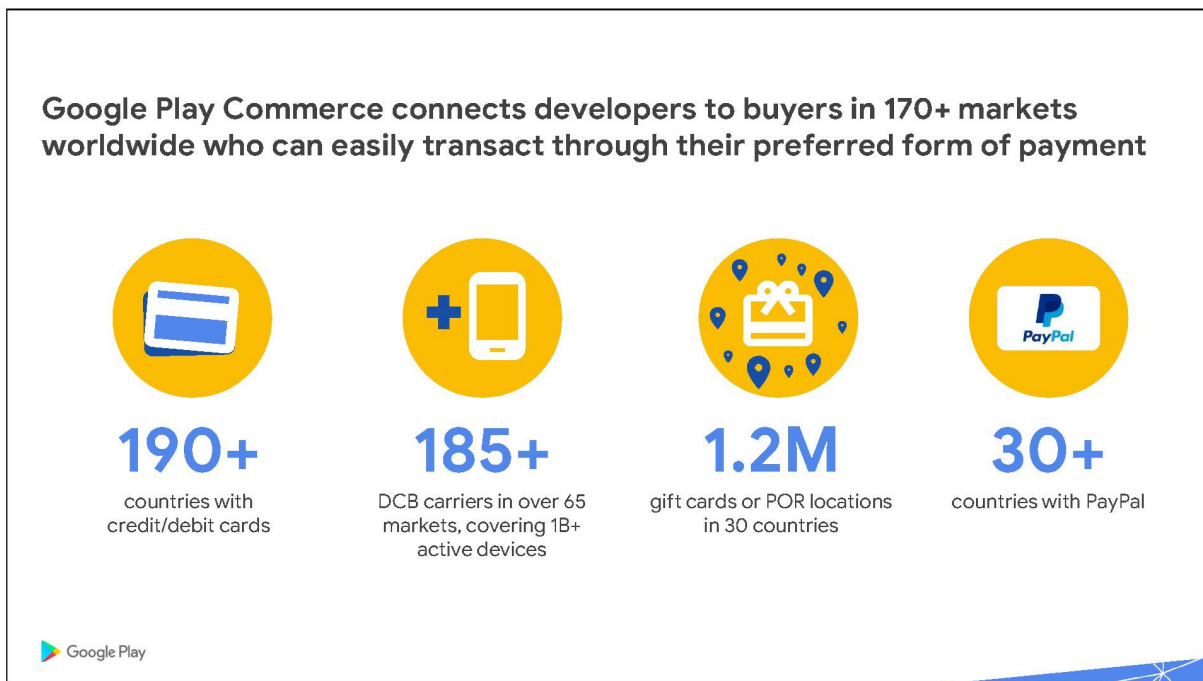
Google Play Commerce provides **businesses** with the tools & capabilities necessary to **successfully monetize their apps**, all built on top of our **trusted & secure platform**.

Google Play Commerce provides **users** a **safe, consistent, and familiar** purchase experience.



- Reaching buyers around the world
- Converting more buyers to users
- Optimizing your monetization model
- Preventing fraud and securing purchases





Key H2 FOP Launches:

IN: PayTM, UPI AutoPay

BR: PIX, PayPal

AR local cards + currency support in H1

When thinking about Play Commerce, most people, including our devs, will point to the ability to carry out global transactions.

Commerce connects dev to over 1 billion buyers in 170+markets worldwide. We do this by constantly work on expanding and improving our FOP (or FORMS of Payments). Key stats:

190+ countries & territories with accepted Credit/Debit cards

185+ partnerships with DCB carriers in over 65 markets, covering 1B+ active devices.

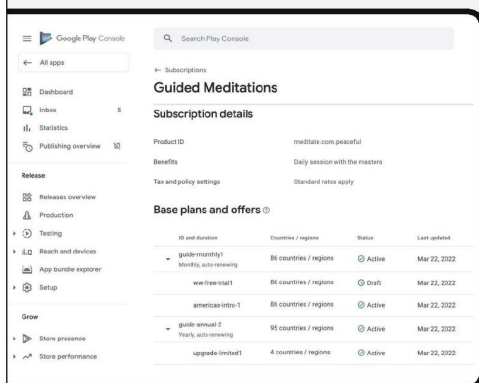
Add to that we also have Play Gift Cards, or POR (Print-on-receipt codes) - Our most visibly sold physical product - bigger than any of our HW business. Currently, in 1.2M locations in over 30 Countries.

We also now are in 30+ countries where PayPal is accepted.

These are just 4 out 10 total "FOP" families. A few additional methods I'd like to call out:

- eWallets have seen significant popularity among users, and we've added many new payment methods such as *MerPay* in Japan, *KCP* in Korea, *Mercado Pago* in Mexico, and several others.

In summary, there is a lot of different teams (from Android BD that works with our DCB partners to an entire dedicated to to GC production & distribution, to a dedicated Play Commerce PM/ENG teams that builds many of the tools I will speak of next, that helps bring all of this together for our Developer partner and users to have a easy & safe purchase experience on Google Play.

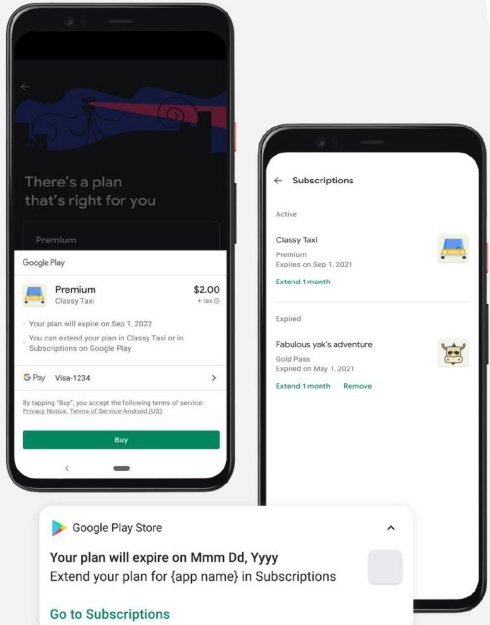



New for subscriptions

Flexible pricing

New features unlock more flexibility and control for developers:

- **Base plans** separate what you sell from how you sell it
- **Offers** support conversion and retention throughout the lifecycle
- **Regional availability** limits where a plan or offer can be purchased
- **Dev-determined eligibility** enables second-chance trials & winback offers
- **Price changes** for new and existing subscribers, with control over whether / when existing subscriptions change





New for subscriptions

Prepaid plans

- Supports all auto-renewing billing periods, **plus** 1-day and 3-day plans
- Play **reminds users** to extend their plan before it expires, and sends RTDNs enabling you to send your own
- **Seamless plan change** between prepaid and auto-renewing
- Supports for all payment methods supported for one-time purchases

1 day

3 days

1 week

4 weeks


1 month

3 months

6 months

1 year



2, 4, 8 months available in EAP

 Google Play Store

Your plan will expire on Mmm Dd, Yyyy

Extend your plan for {app name} in Subscriptions

[Go to Subscriptions](#)



New subscriptions feature
In-app messaging


~2x
Subscription recovery when users saw the message*

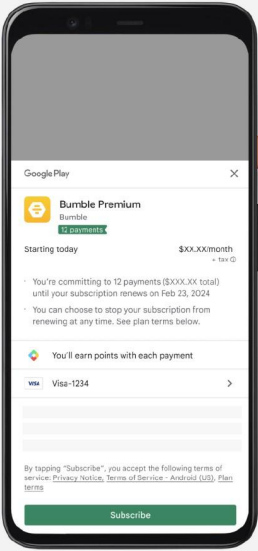
Helps **reduce churn** from payment decline with an actionable message presented in your app with a single API call

Now available in Play Billing Library 5.0

* Based on experiments with early users

We're constantly working to reduce churn through experiments and features
This comes from developer feedback that it was hard to implement this using RTDN
Are there other things that have worked for you?

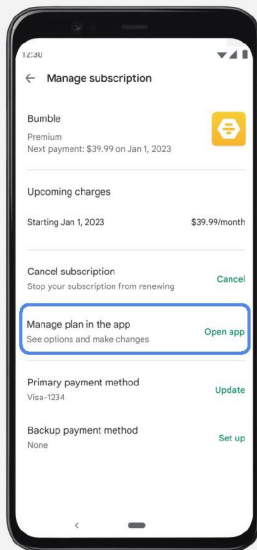
 Google Play



Coming soon

Installments EAP

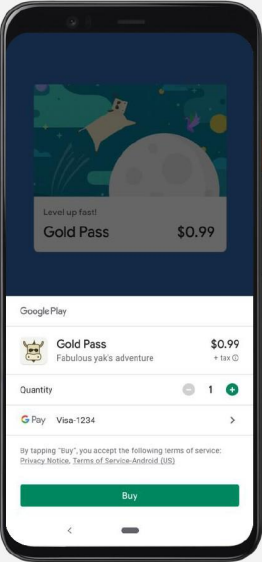
- Allows users to subscribe with monthly payments as part of a long-term commitment period
- Cancellation is effective at the end of commitment period, though involuntary churn is still possible for a monthly renewal
- EAP will initially be available in Brazil and France



Coming soon

Subscription Management EAP

- **Restorable Cancel API** allows customized in-app cancel flows equivalent to the Play Store experience
- **Manage in App** (on left) is an experimental feature enabling Play to deep link into the app to take actions such as changing their plan



Google Play

New one-time purchase feature

Multi-quantity purchases

Frictionless checkout for users who want to buy a large quantity of a popular item

“The reaction from high value gamers was particularly positive, resulting in a significant portion of our total sales coming from multi-quantity orders.”

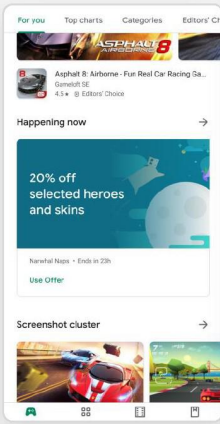
NCSOFT

* Based on experiments with early users

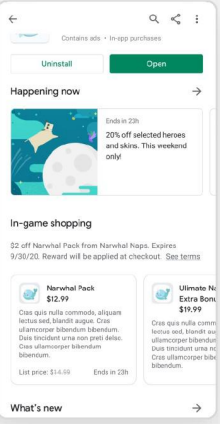
We're constantly working to reduce churn through experiments and features
This comes from developer feedback that it was hard to implement this using RTDN
Are there other things that have worked for you?

Google Play

Play Home



App Details Page



Coming Soon (in Early Access)

Featured SKUs

Reach buyers outside your app.

1. Showcase your in-app content across multiple Play Store surfaces
2. Users can purchase your in-app content directly from your App Details Page (or other places on Play)
3. Select certain new or promotional SKUs to feature
4. If you offer a promotion it will be amplified across the purchase flow
5. Initial country availability: Indonesia, Thailand, Vietnam, Malaysia, Brazil, Mexico and India

EAP Devs saw:

1-2% average order uplift when promotions are offered

2% buyer uplift when promotions are offered

5-6% uplift of re-engaged buyers

1-2% uplift of new buyers

6-7% increase in new buyers with subsequent purchases

35% order uplift and buyer uplift for best performing single title



Discussion

02

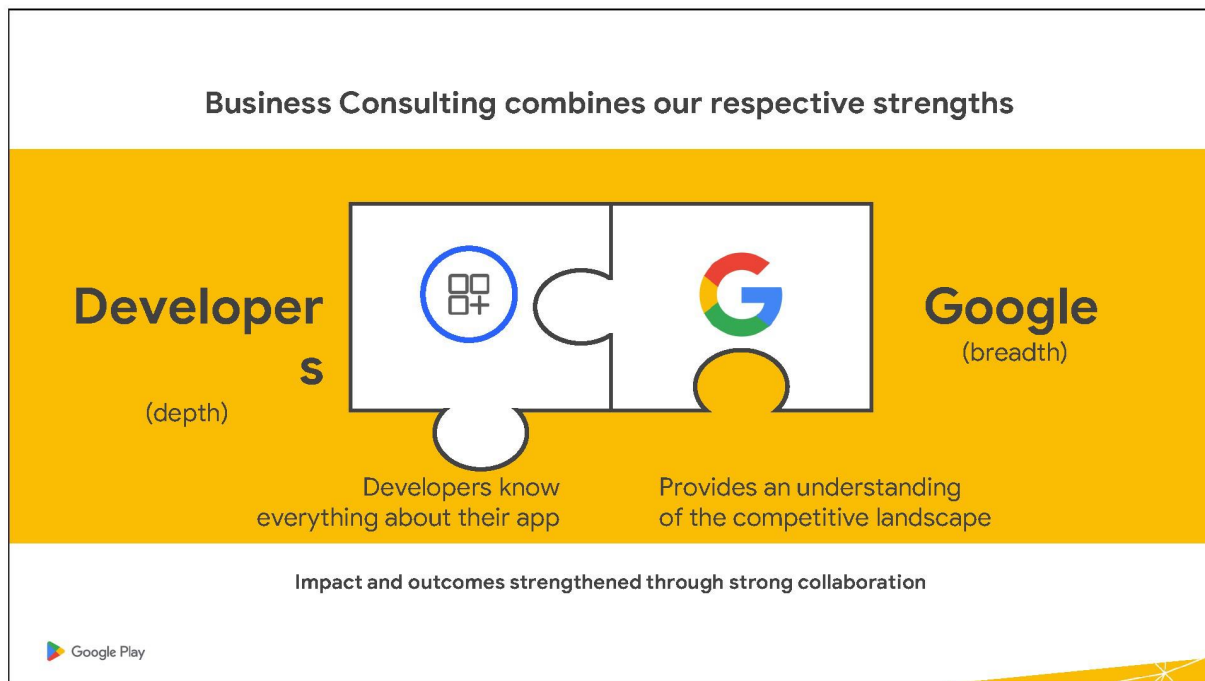
Growth Consultation and Custom insights

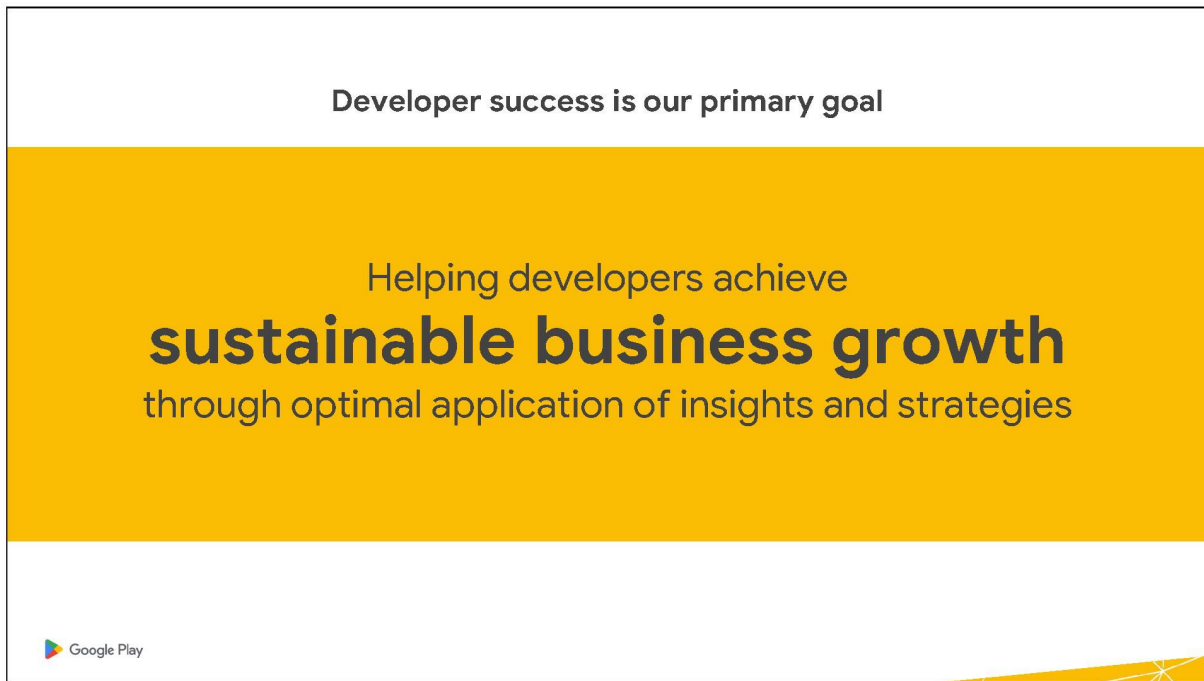


Adam Carpenter
Director, Play Partnerships,
Global Business Consulting
(He / Him)



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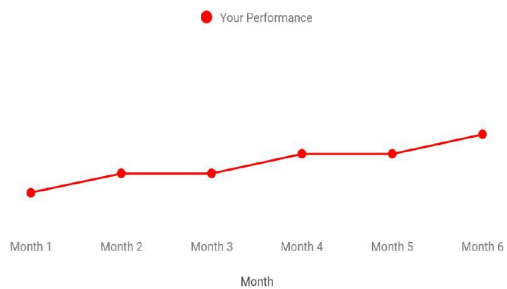




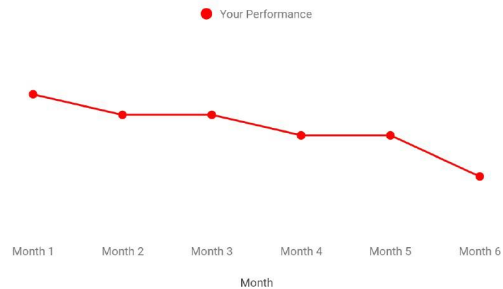
Dual Mantra:
Make developers more successful & Make more successful developers

Consulting insights bring enhanced clarity to business performance

Example - Engagement



Example - Buyer %



Are trends like this good, bad, or uncertain?



Comparisons provide context and enhance developer decision making

Your Engagement vs Market Peers



Your Buyer % and Market Peer



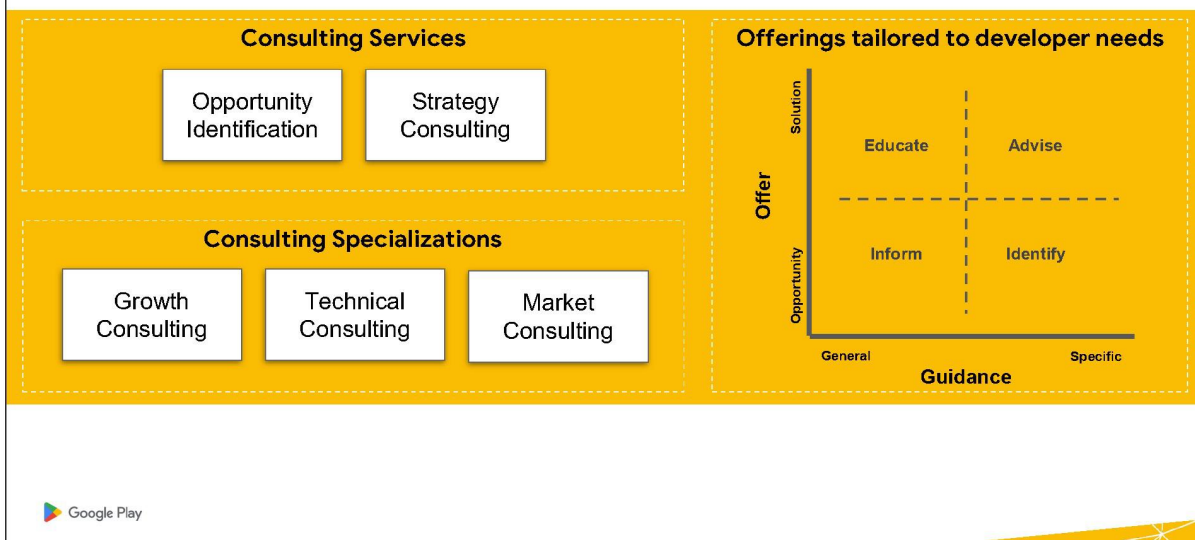
Understanding performance vs. market factors and competitive landscape brings expands perspective



Goal is to help developers make better decisions

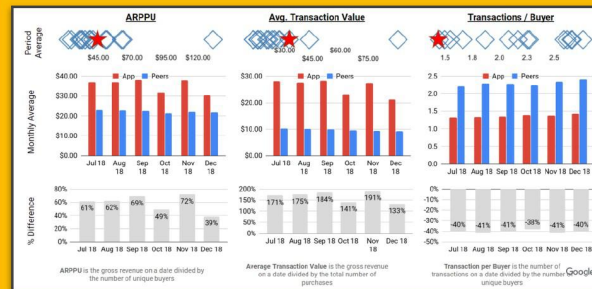


Deep domain expertise enables business growth



Insights and experience strengthen decision making

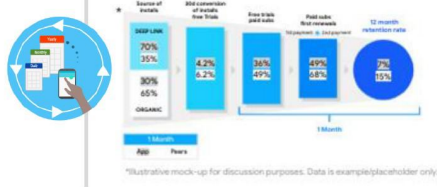
- **Category and Market Benchmarking**
 - Contextualized performance insights
- **Product Consultations**
 - Performance driven funnel analysis
 - Objective feedback on strategies & roadmaps
- **Structured solutions from an independent perspective**
 - Proven strategies & recommendations
 - Feedback from an objective and trusted outside party



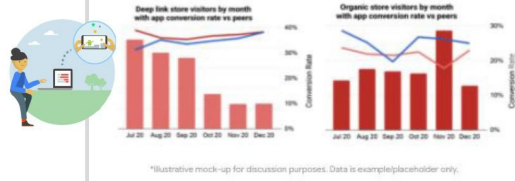
Example slide from Opportunity Analysis reports

Consulting solutions enable developers to achieve tactical & strategic goals

Subscription conversion & retention



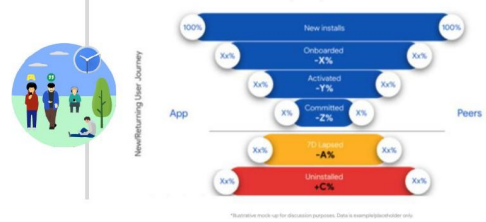
Acquisition & install conversion



Localized pricing



User journey & engagement



Best results achieved through open communication & collaboration

1. Open, honest dialogue
 - Transparency is key to focusing resources on the right opportunities
1. Two way discussions are best
 - Leverage respective expertise to maximize context
1. Business consulting is a partnership
 - Optimal impact achieved via shared growth plans & opportunity identification
1. Emphasize insights -> outcomes -> impact
 - Focus requests and sharing on insights which best enable decision making
1. Share implementations & outcomes
 - Providing feedback on changes & impact helps us help you

Optimal outcomes generated by deep & collaborative consulting engagements



Minimize sharing 'data for the sake of data'



Global
 MAU Share = 20%
 Time Share = 17%
 Installs Share = 13%
 Spend Share = 22%

02

Investing in Form Factors



Matthew McCullough
VP of Android Developer
(He / Him)

 Google Play

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MJM: Users increasingly are leverage multiple devices. Better Together starts with foundational experiences across key surfaces

Phone is the center

Wearables

Tablets - what we're talking about today

An app's experience is not just about how they work on a phone, but across all relevant surfaces in the android ecosystem

Google & OEMs are investing in Large Screen Innovation



Foldables

A once-in-a-generation hardware innovation

Market fit & user base. Foldables are the future of the premium segment of the Android market.

Solving ergonomic limits. A foldable device is a tablet that fits in your pocket. Now you can fit a tablet-sized screen in your pocket, unlocking utility users previously wouldn't be able to get.



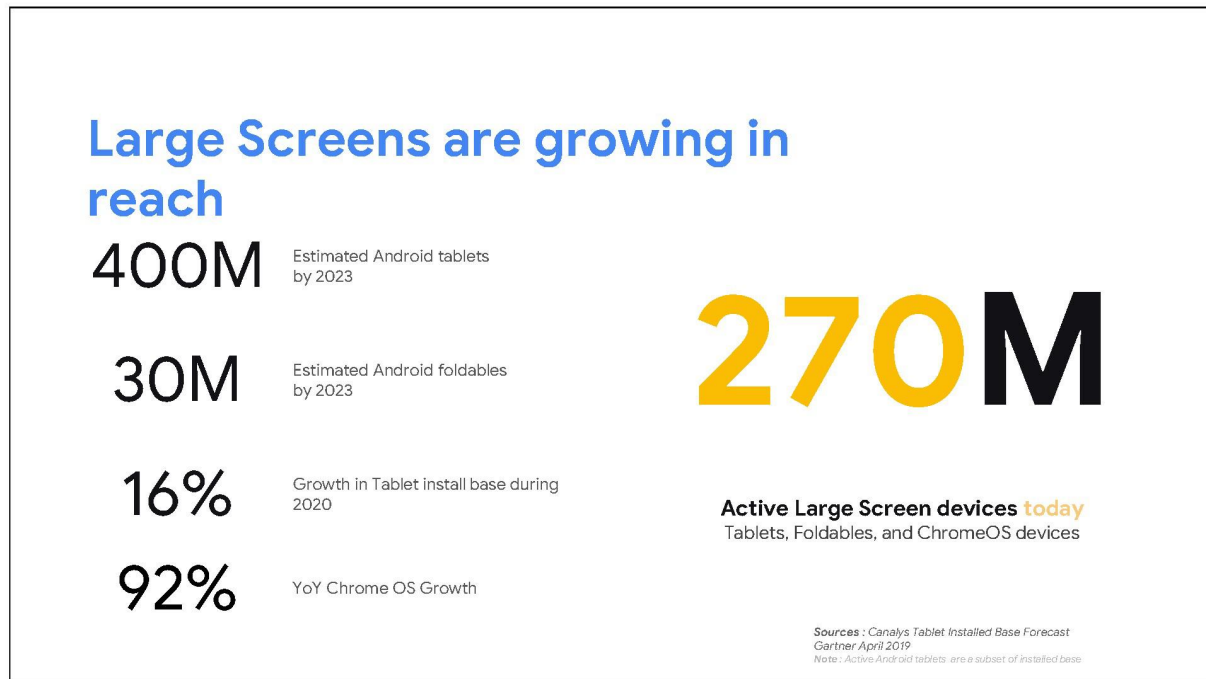
Tablets

An important and growing platform

Expanding reach. OEMs are investing in Android tablets and bringing more capable tablets to the market. We have seen use cases expand beyond consumption, with broader appeal for enterprise, education, and personal productivity.

Today, our focus is on Large Screens - both foldables and tablets. This is where we see the biggest opportunity for Bumble. We view foldables as the future of the premium segment of Android. Now you can fit a tablet-sized screen in your pocket - our thesis is that this unlocks utility you previously wouldn't be able to get except for on a laptop. So when we're thinking about our app ecosystem, we're excited because this is a hardware shift that will drive new expectations from users as to what you can do from a phone.

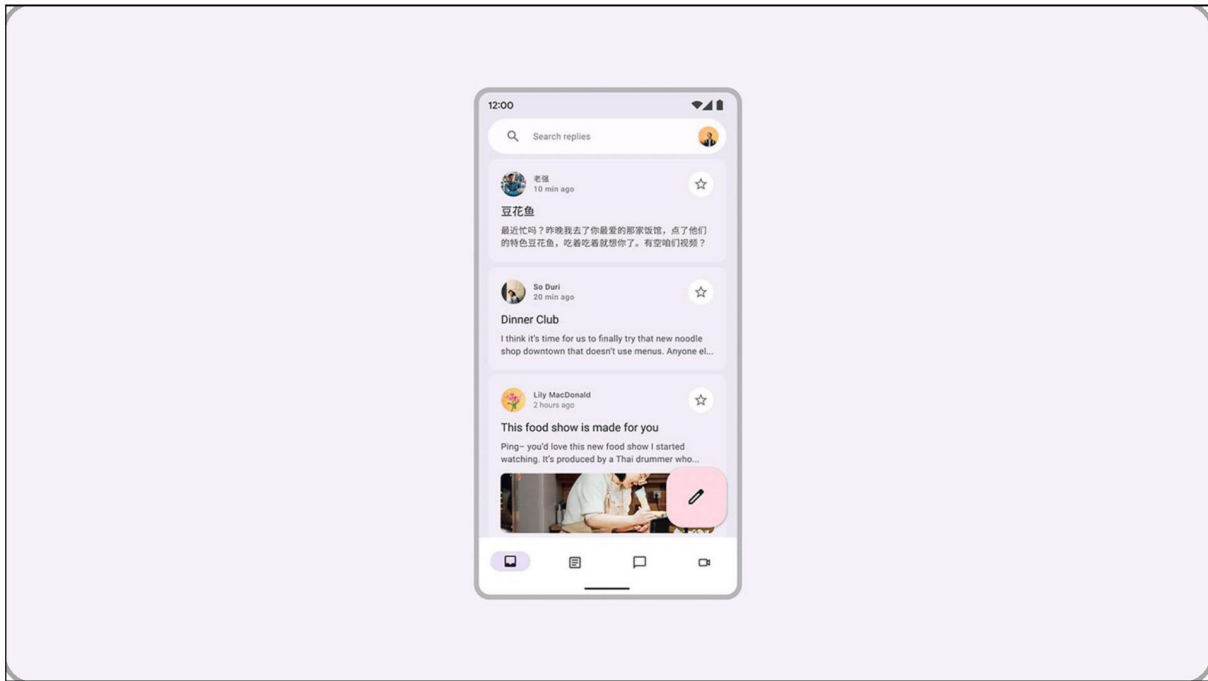
Tablets continue to be a growing and important platform as use cases have expanded beyond consumption to productivity. OEMs are investing in Android tablets and we saw their usage significantly change with WFH. Google is also investing heavily. And in fact, as we announced at I/O, Google will be launching a first-party Tablet in 2023. In parallel, we are working closely with developers to create amazing experiences, to ensure user expectations are met. Which is why we're here today...Applications need to work across these form factors and consumption experiences benefit from additional real estate.



Over the past year, we've seen device makers release exciting new foldable and tablet devices. Demand has increased as users are doing more than ever from these devices while at home. Tablets sales grew 16% in 2020 with analysts expecting more than 400M Android tablets by 2023, AND foldables are redefining what's possible on premium devices, with an estimated 30M foldable devices in the next 2 years.

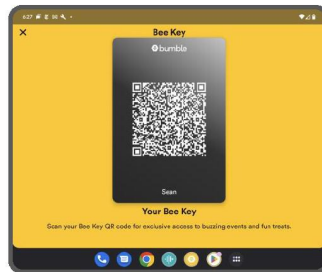
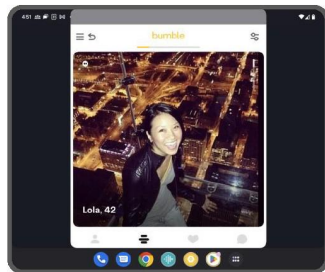
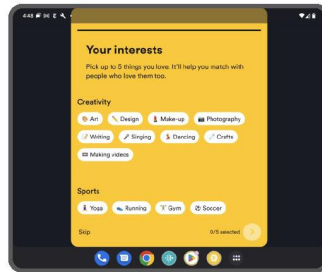
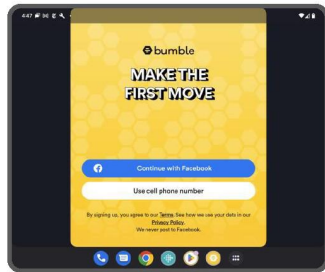
Android apps can also run on ChromeOS, which has seen a surge of interest, and is now the 2nd most popular desktop OS. Altogether, an app today can reach more than 250M active foldables, tablets, and Chromebooks by building for Android large screen devices.

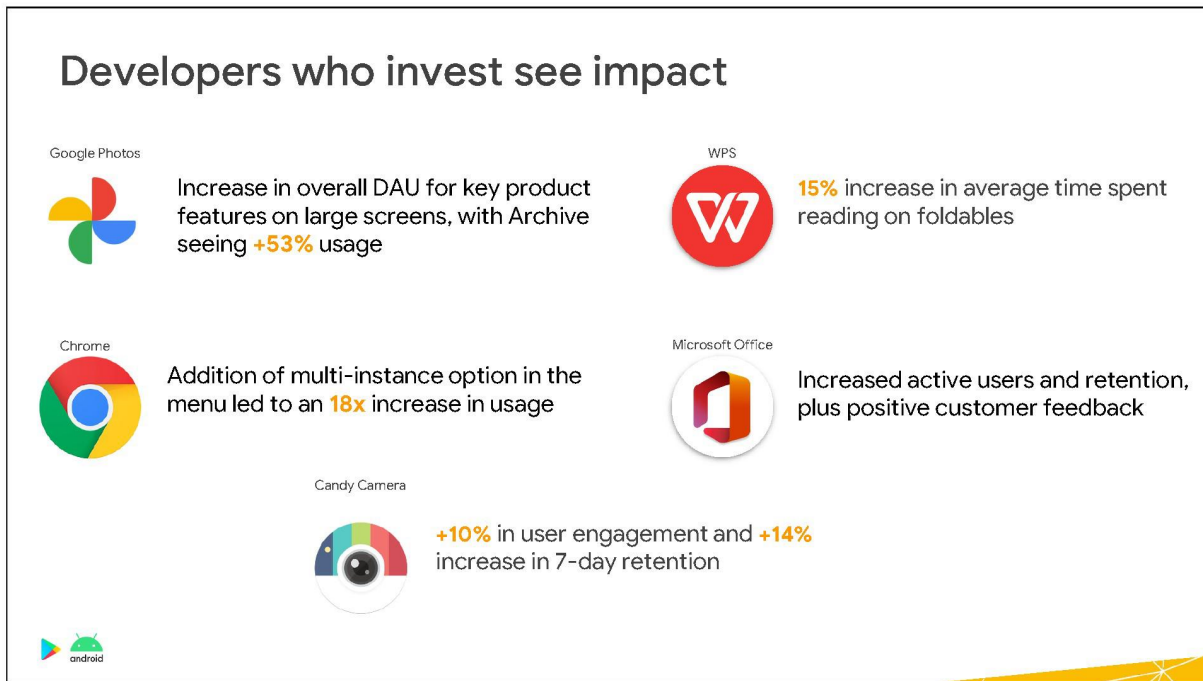
We're excited about this momentum as large screens continue to grow in reach - and we're working with many developers to get their apps ready



Our approach for Large Screens is an adaptive UI that can scale from the Phone to a Tablet. We've been building APIs, Tools and Android Studio, and Jetpack Libraries (Including Compose and Views Support) to help. Multiple apps that were traditionally phone-sized only are expanding to large screens e.g. FaceBook, Whats App, TikTok.

Bumble today on a Foldable





I mentioned that we're working with many developers to optimize, and their starting to share impact. Highlight a few. Pause for questions before handing it over to talk about how Google is investing.

Google Photos: Significant increase in usage of specific features -> After investing in optimizing for large screens, Google Photos saw overall increase in DAU for key product features on large screens, with Archive seeing as much as a 53% usage increase

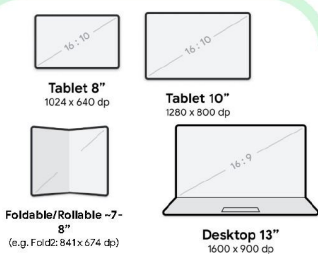
Chrome: The addition a multi-instance option in the menu led to an 18x increase in usage. Multi-instance is used 42% more on tablets and foldables than on phones that support the feature and 78% multi-instance users use two instances.

WPS - 15% more time reading

Office - Increased active users and retention, and positive user feedback

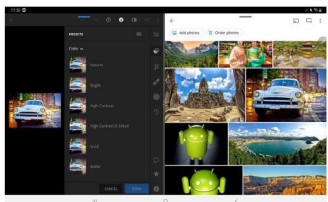
Candy Camera: With optimizations for large screens, Candy camera saw a 10% increase in user engagement and a 14% increase in 7-day retention

Tablet/Foldable Optimized Support - “Large Screen Optimized”




Design for Large Screens

- Support Portrait and Landscape
- Support full edge-to-edge
- Add Tablet Layouts for resolutions (>720 dp)
- Use Material Adaptive Components



Multi-tasking

- Handle folding/unfolding
- Handle multi-window & window resizing
- Handle portrait / landscape rotation
- Support multi-instance & multi-resume



Input Modes

- Touch Targets: At least 48dp
- Basic Keyboard navigation
- Keyboard shortcuts
- Mouse behavior (left/right click, scrolling)

When we talk about optimizing for tablets / foldables we are talking about three main buckets:

Design for large screen

Support for portrait and landscape orientations

WHY: These devices are more likely to be used in either orientation, and you'll also see tablets get docked for laptop use (also like what we just announced at MBG)

Leverage the extra real estate.

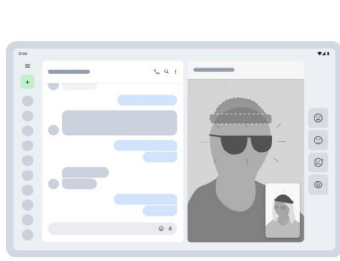
Multi-tasking and configuration changes

WHY: We are not in Kansas anymore and we're not the only app the user sees. Android 12L introduced a taskbar meant to increase split-screen usage on large screens - meaning your app can be resized when a device is folded / unfolded, put into split screen.

Need to support Resizability (Multi-window) & multi-resume.

Input mode - Tablet update of keyboard, stylus and mouse is much higher than phone. We need (at the least) basic accessibility support

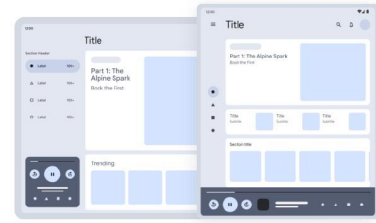
Larger screens allow for more variety in layouts



Chatting & Viewing Profile

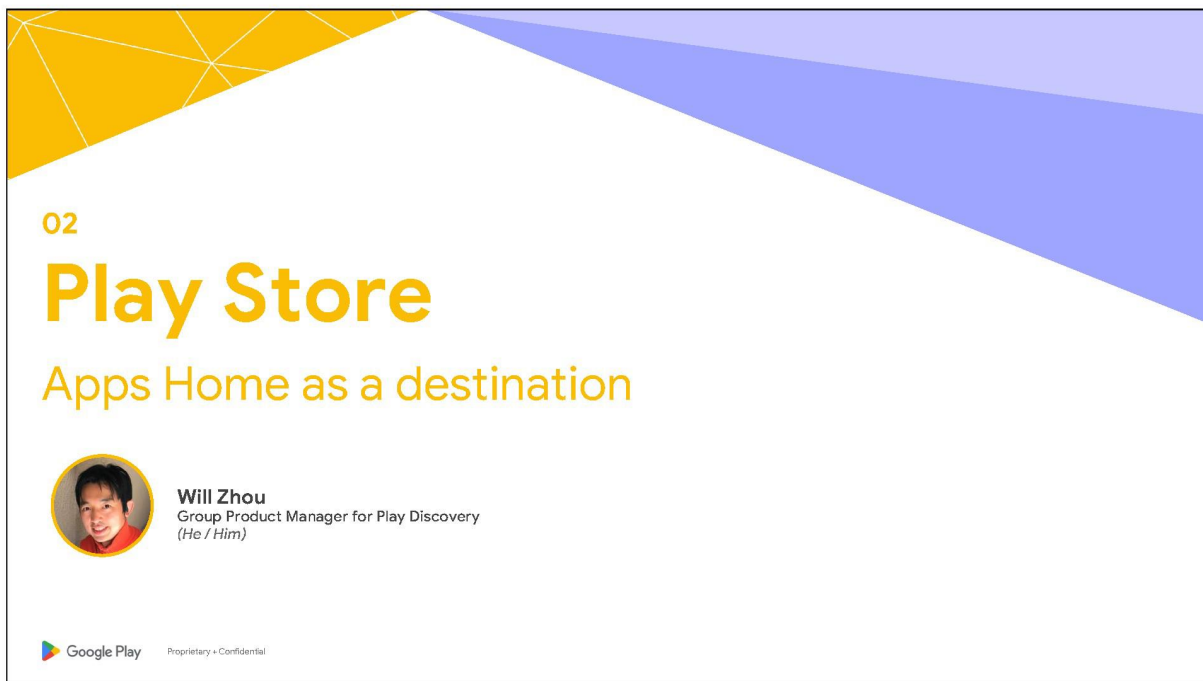


Viewing Multiple images in a profile or multiple profiles



Additional Layouts


Beyond these more functional requirements, we think the larger screen presents many potential different layouts - there's a lot of possibilities. Here are some examples we have worked on with other apps that we think could be valuable for bumble. Our designers would be happy to collaborate or do working sessions on what's possible for a hero experience if you're interested, it's something we've done before and are happy to engage on.




02

Play Store

Apps Home as a destination



Will Zhou
Group Product Manager for Play Discovery
(He / Him)

 Google Play Proprietary • Confidential

White Option

Evolution of apps home discovery experience

- 01 ○ Visual Refresh
- 02 ○ In-app surveys for item Satisfaction
- 03 ○ Coming soon: Amplifying content
- 04 ○ Research: User-centric approach to sensitive categories

Visual forward destination launched in US (English)

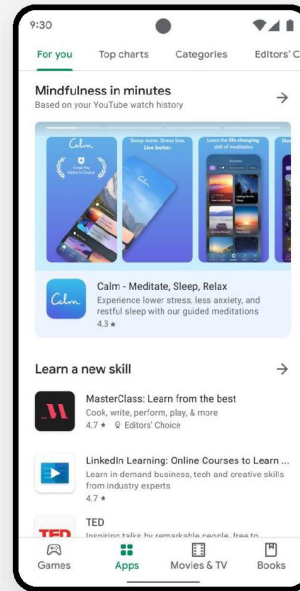
More helpful and joyful formats than just icons

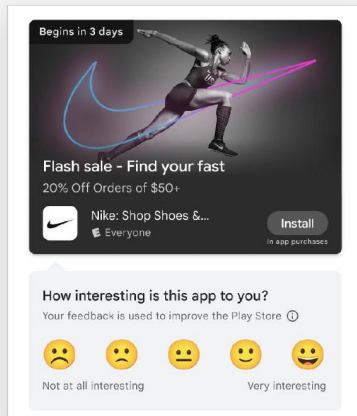
- Larger format showcasing store listing screenshots
- List-based format showing snippets or tags

New requirements for new formats

- High content quality of snippets and screenshots

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User satisfaction

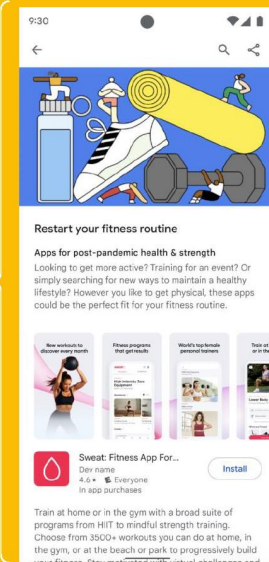
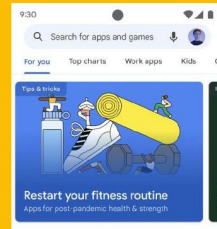
- User satisfaction are surveyed inside the store
- Data will be used to improve the experience

Coming soon: Amplifying Editorial content

Helping users learn more about interesting categories and areas

- Larger homepage format to highlight editorial
- Additions to editorial team to increase quality and quantity of content

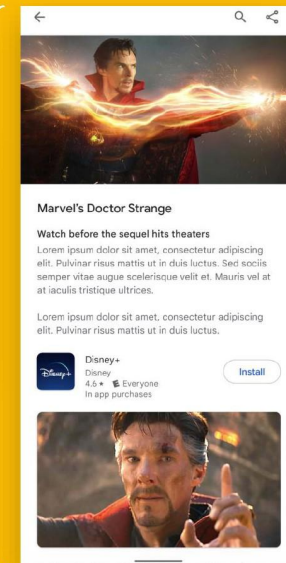
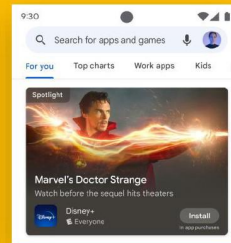
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Coming soon: Amplifying LiveOps content

Showcase interesting and relevant moments to users

- New card format to highlight LiveOps



Current research areas for sensitive app categories

Age targeting

Filtering users under a specific age

Reinstall targeting

Guardrails to minimize bad user experiences

User choice

Give users a way to dislike certain recommendations





03

Bumble Ads

Powered by Google Ad Manager 360



Jon Sheffield
Strategic Partner Lead, Large Partner Solutions
(He / Him)

 Google Play

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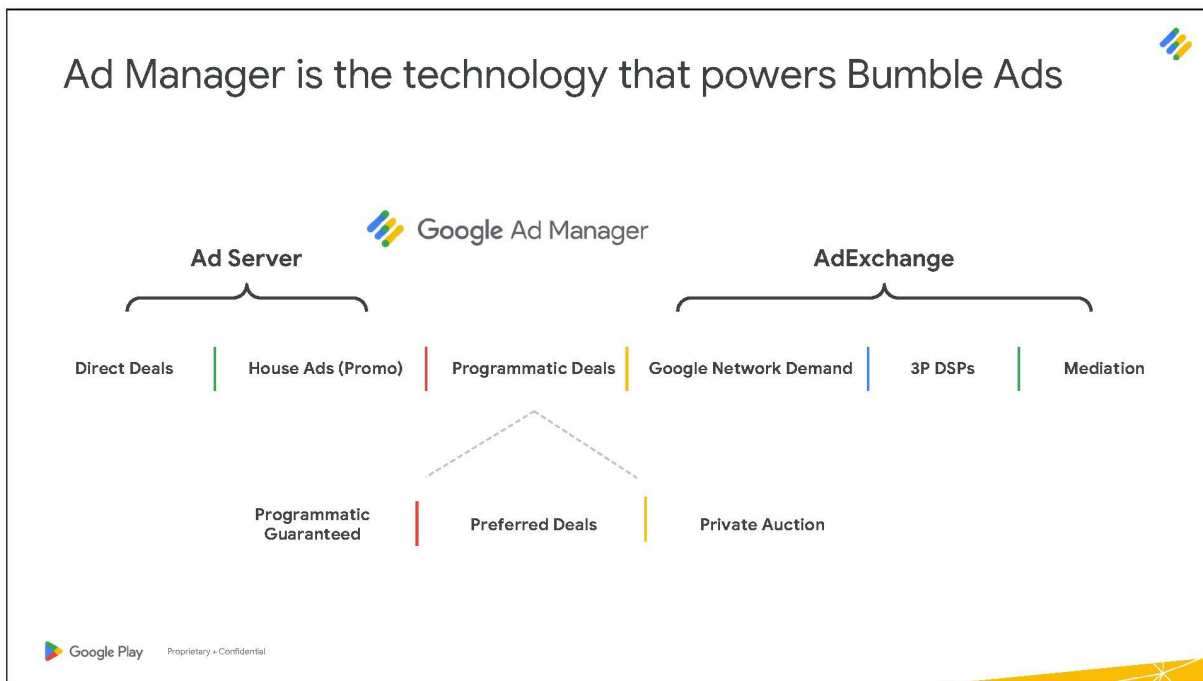
Agenda

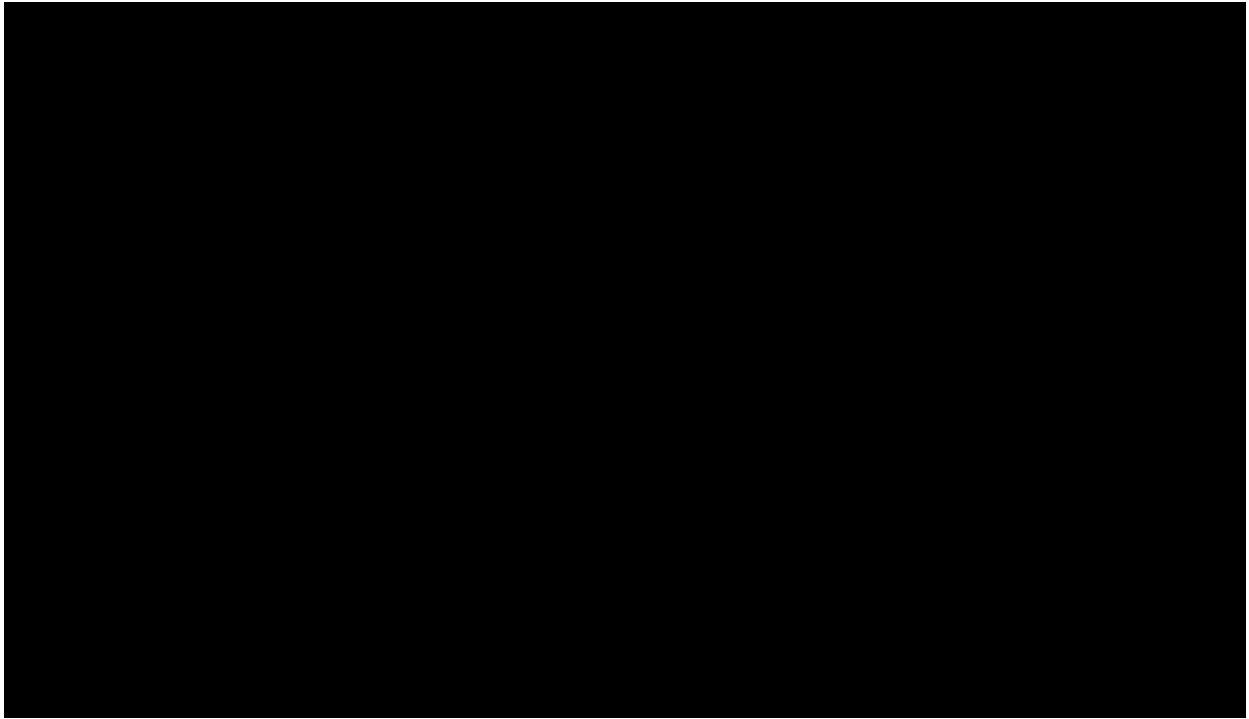


01 ○ Bumble & AM360 | Today's Partnership

02 ○ Key Product Themes for 2023

- Ads Formats Innovation
- Shift in Direct Sales to Programmatic Channels
- Audience & Identity





August Performance:

+29% on AdX

+77% overall

\$12M ARR - only Badoo - will >3x with launch of Bumble, will also stand to increase from planned format updates

Partnership Goals & Accomplishments as we round out the year



Property	Launch	Rev Impact	Launch Date
All	IAB TCF Integration	Medium	Q4 2022
Bumble	Native Ads Launch	High	Q4 2022
	1st Party Data Activation	High	Q1 2023
	Programmatic Launch	High	2023
Badoo	Native Ads Re-launch	High	Q4 2022
	Rewarded Interstitial	High	Q1 2023

Accomplishments: AdManager 360 contract, Platform Migration, PPID launch, New 3rd party partnerships,

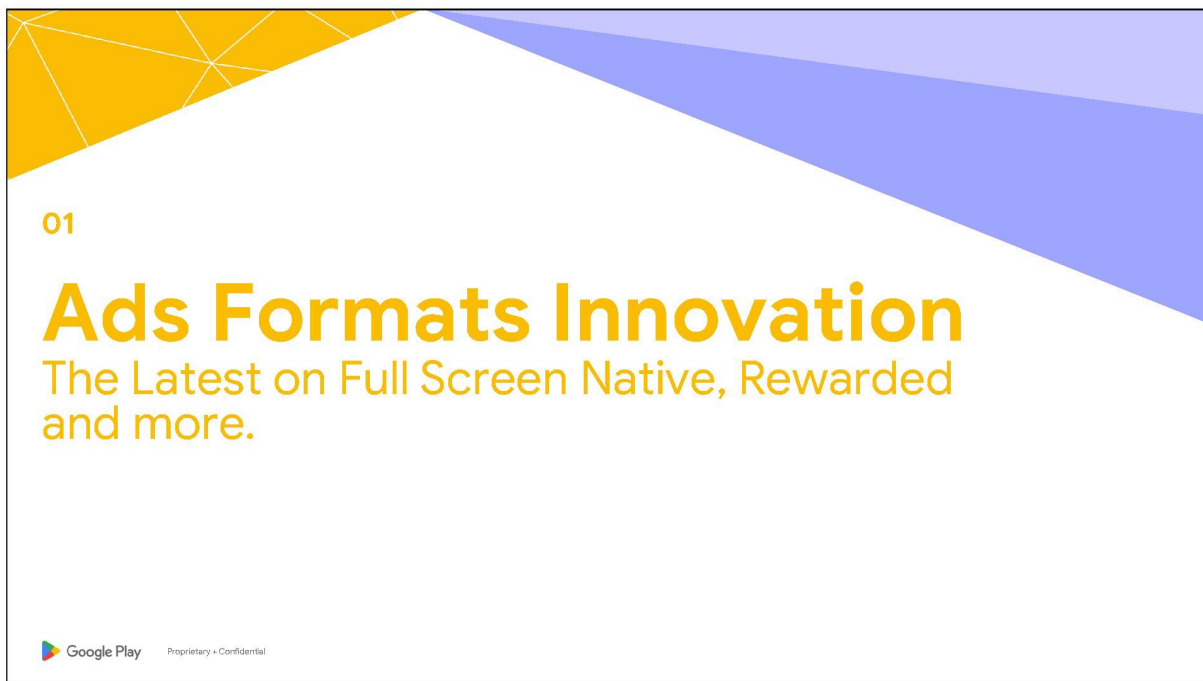


The slide features a large orange rectangular area in the center. At the top of this area, there are three numbered circles (1, 2, 3) each followed by a title and a description. The first circle is blue, the second is red, and the third is green. The descriptions are in smaller text below the titles. The slide has a white header and footer. The footer contains the Google Play logo on the left and a yellow starburst graphic on the right.

AdManager Product Themes for 2023

- 1 Ads Formats Innovation**
Investments in premium formats such as Full Screen Native and Rewarded Video.
- 2 Programmatic Direct**
Product solutions and trends relating to the channels advertisers buy and ensuring Bumble is ready to activate.
- 3 Audience & Identity**
Empowering publishers to leverage their relationships with users to better and more effectively deliver an ads experience.

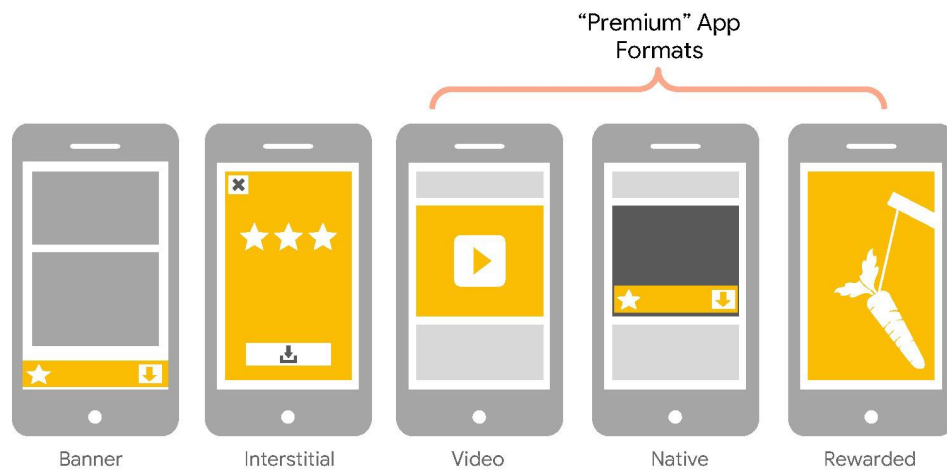
Google Play



White Option

01

How do we define ads formats in a mobile app experience?



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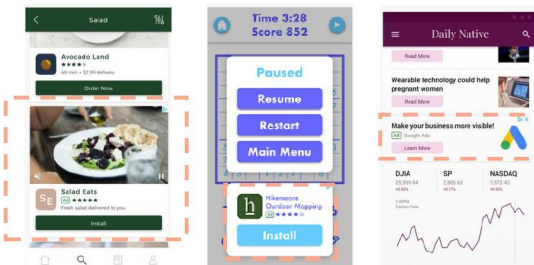
speaks to advertiser component, and how the publisher 'renders' the format
emphasize "premium" bumble is, etc

01



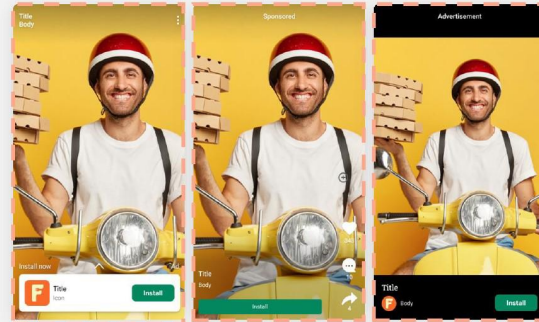
Example: Comparing full screen native to other implementations

Common native implementations for small and medium banners



Native

Native implementations for rich, fullscreen experiences



Full screen native

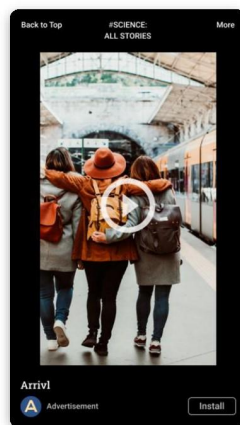
01



What are some popular customizations of full screen native ads?

Swipe ads to dismiss

A swipe can be used to dismiss the current ad and move to the next piece of content.



Custom video playback controls

Publishers can render their own play/pause and mute controls.

Custom aspect ratio for ads

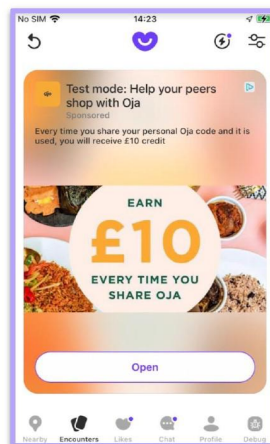
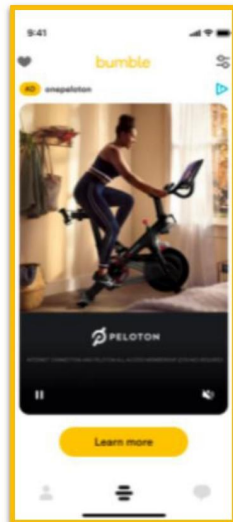
Specify portrait, landscape, square, or all.

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emphasize swiping for click

01

Bumble and Badoo Formats Today ...



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01

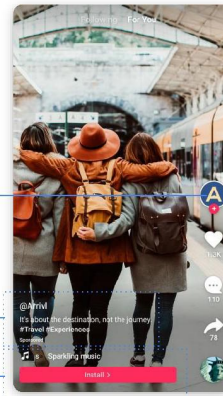
Full screen native - Features

1) Updated policies for full screen native (Beta)

Policies for native ads allow two new features:

- I. **Asset overlays:** smaller assets like call-to-action buttons and text may be placed on top of the main image or video
- I. **Screen holds:** video ads can prevent being dismissed for a up to 5 seconds

Call-to-action button,
text, advertiser icon
placed on top of the main
image / video



Asset Overlays

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These features enable publishers to create ads experiences that match their content experiences.

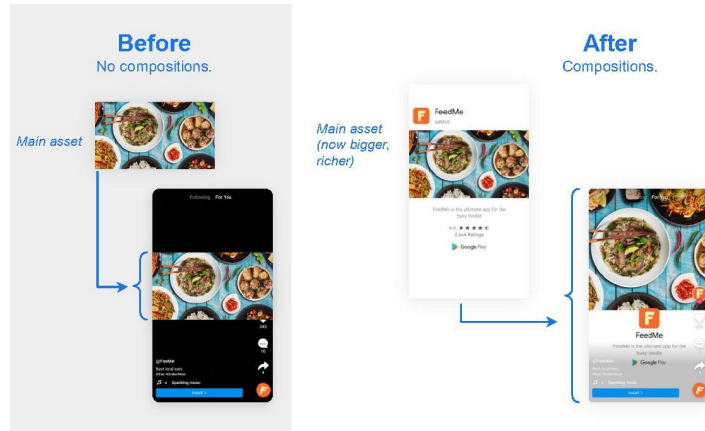
Reminder: a close button MUST be present, unless you implement a swipe to dismiss.

01

Full screen native - Features

2) Compositions for full screen native (Beta)

- **Definition:** Compositions are improved ad assets that make better use of larger screen space
- **Benefits:** Improved CPM performance, more effective use of space, superior user engagement

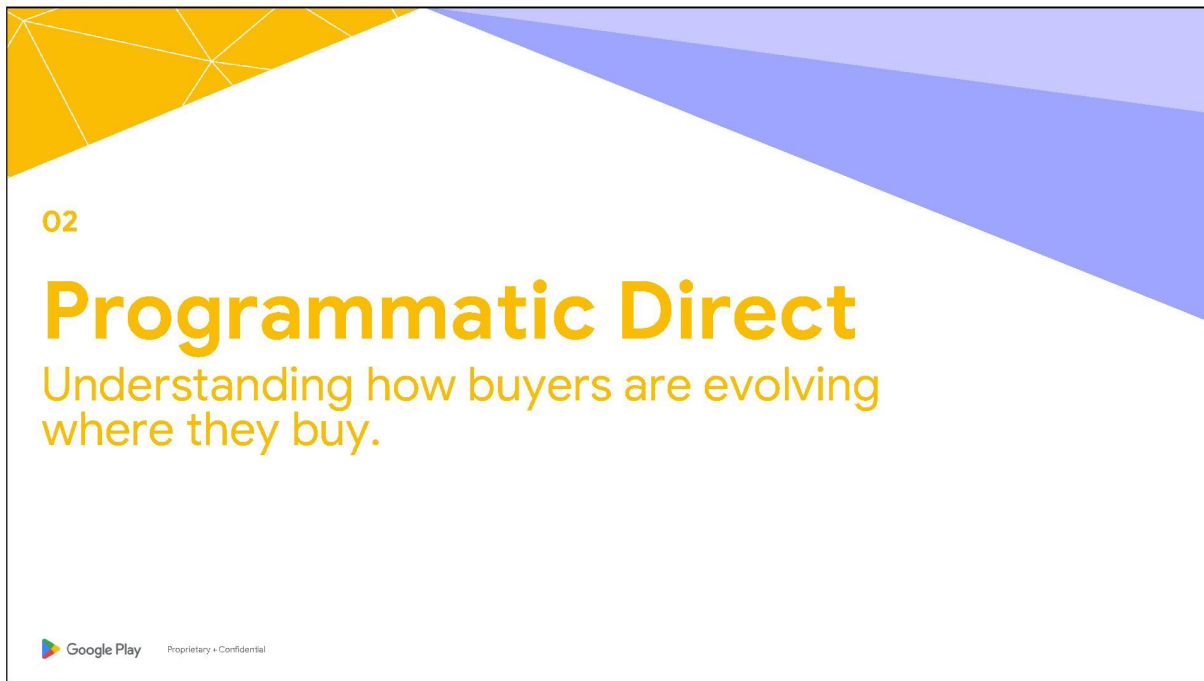


01

So what should Bumble do with this information???



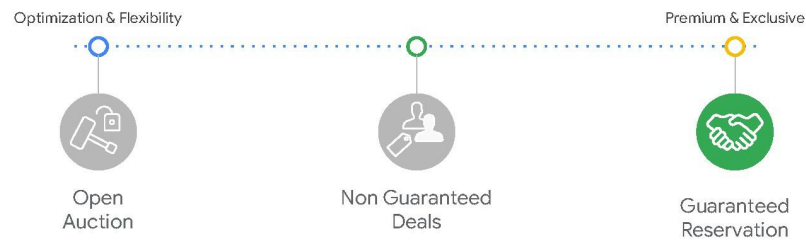
1. Continue to invest in Full Screen Native experiences and other premium ad formats
1. Evaluate new beta opportunities for increased UX control on the 'client side'
1. Build formats so they can scale in both automated (programmatic) environments and to be sold directly to advertisers



White Option

02

Programmatic Buys Look Very Different Depending on the Channel.



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Simply, "Programmatic Direct" is a direct deal trafficked through buyers' technology (often referred to as a DSP)

02

Buyers are **moving direct budget to programmatic**.
It's important for our partners to prepare for this shift.



Fragmented buying

1. Overexposure to user



Consolidated buying

1. Reduced overexposure
2. More reach for same investment

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~10% more reach due to universal controls of audience lists and frequency

02

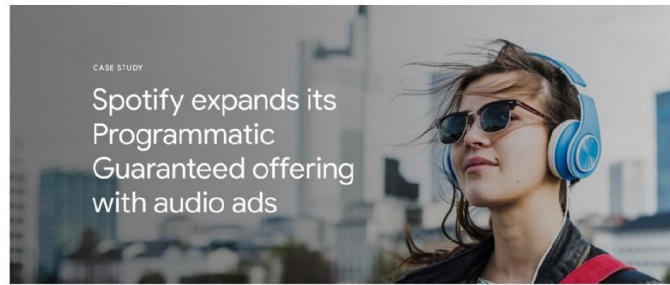
So what do we do with this information???



1. Continue to invest in all forms of Direct → both traditional and programmatic
1. Ensure your sales team have experience in programmatic, or,
1. For those *new* to programmatic, trainings are available and Google is open to running trainings with your team
1. On the Formats front, ensure formats are compatible with programmatic standards

02

Spotify - a best in class example of embracing and growing with programmatic



Tags: [Ad Formats](#) [Core Ad Serving](#)

One of the world's most popular audio streaming companies, Spotify has run many successful ad campaigns. But one campaign stands out for Greta Lawn, Spotify's Head of Global Automation Sales. She calls it one of her favorites.

The client was a beauty brand with an audio message to deliver at scale. The solution was to use Spotify's Audio offering through Programmatic Guaranteed, the Google ad-automation solution that lets advertisers execute direct buys with publishers with tagless trafficking, consolidated reporting and billing, and advanced audience capabilities that help narrow who your ad is shown to – all without manual processes like exchanging tags, troubleshooting discrepancies, and handling multiple invoices.

Full Case Study Linked [Here](#).

The Goals

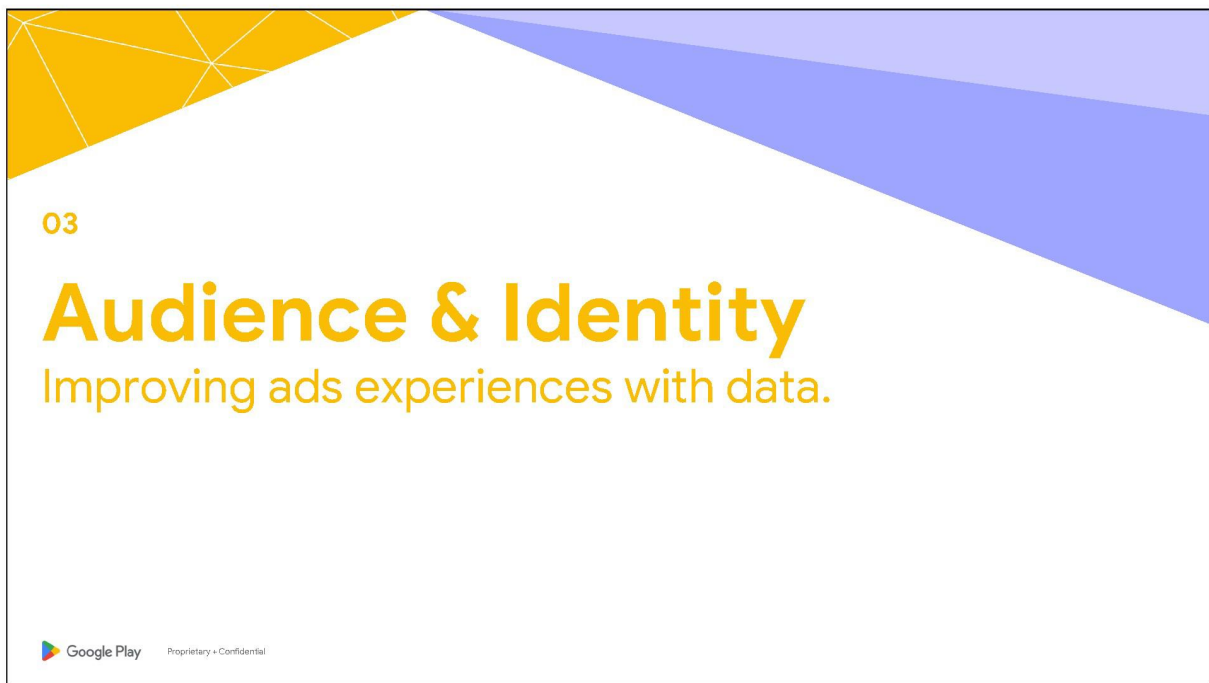
- Grow programmatic revenue across premium inventory
- Provide buyers with streamlined access to guaranteed inventory

The Approach

- Hire programmatic experts and cross-train staff on the value of programmatic



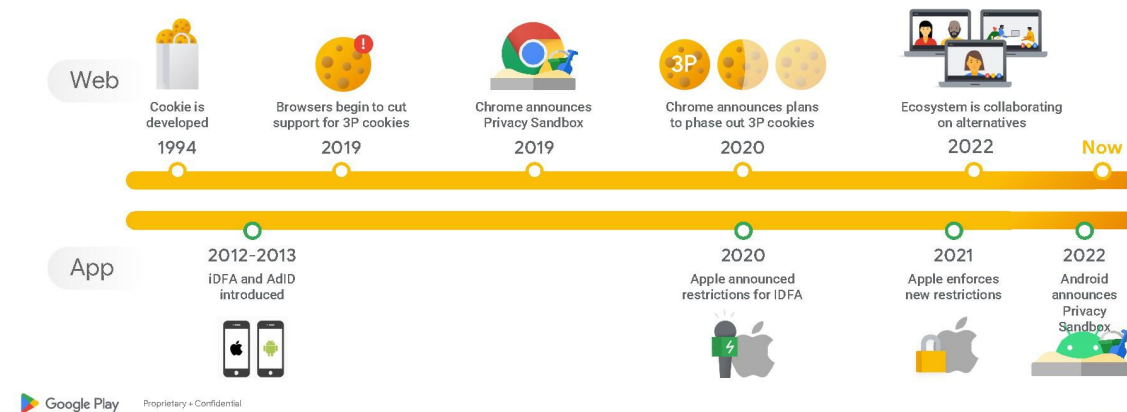
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White Option

03

The industry has gone through rapid change to build privacy-first solutions.



03



As the industry evolves, customers are facing new challenges



Agencies and Advertisers

- Measuring/tracking impressions and conversions
- Getting relevant ads in front of the right users
- Invest in solution that is privacy-forward and future-proof



Publishers

- Maintaining eCPM rates
- Investing in solutions that will withstand long-term privacy regulations, and user preferences
- Replicating 3P-cookie-based signals with 1P data



DSPs and SSPs

- Evolving technologies and further investing in first-party data solutions to meet changing cookie restrictions
- Integrating platforms with emerging industry solutions

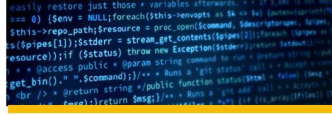
03



These changes have many implications for publishers



Third-party cookies are on the way to becoming obsolete, and **revenue is at risk for many publishers.**



Collecting data to **analyze and understand your users** is invaluable for the future, but doing so can be overwhelming.



Diversifying **revenue streams** requires planning and new product investment.

03

So what do we do with this information???



1. Understand that despite uncertainty around identifiers broadly in the industry, Bumble is operating from a position of strength given your relationship with users.
1. Map the type data that you would be comfortable sharing with advertisers for targeting (ie. an advertiser wants to reach “Males of a certain age demo”)
1. Define that data in the ad server for targeting purposes, and adjust rate card to sell this targeting at a “premium”

03

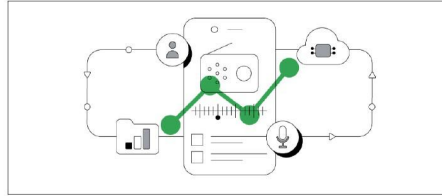
See How Pandora has embraced their data advantage and protected consumer privacy!



How Pandora protects privacy and creates a better experience with first-party data

Maria Breza / November 2021

Share



Full Case Study Linked
[Here.](#)

Back in the heyday of broadcast radio, listener requests and record sales helped stations determine what to play and when. These days, those signals still matter, but data science enables Pandora to engage each of our 70 million listeners with song selections that they didn't even know they wanted to hear next.

Google Play Proprieta

Cookies help us deliver our services. By using our services you agree to our use of cookies. [Learn More](#)



Questions?

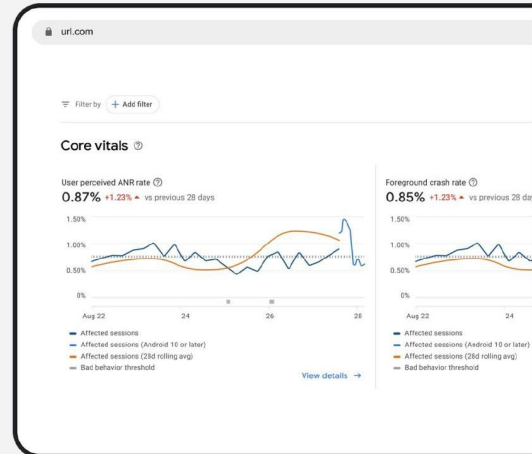


Thank you

Q3: Quality and discovery

Quality as foundational across Play

- **New quality metrics** in Android vitals: more closely track user-impacting issues
 - Crashes >> user-perceived crash rate
 - ANRs >> user-perceived ANR rate
- Continued **overall bad behavior thresholds**
- New **per-device bad behavior thresholds**
 - Issues and emerging issues reported in Android vitals
 - Store listing warnings on Play



New quality metrics in Android vitals

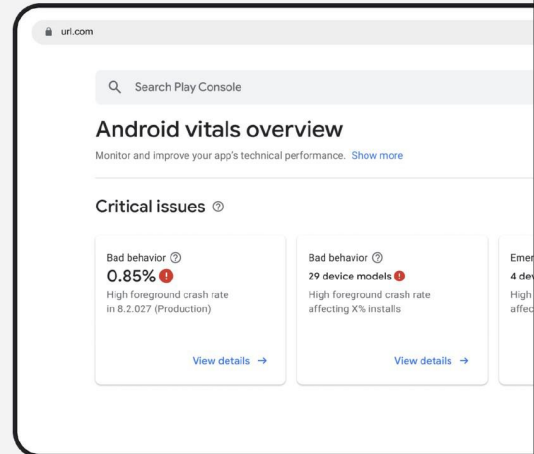
COMING SOON

Moving forward, we're replacing the existing core vitals metrics with new more user-centric metrics, starting with foreground crash rate and user-perceived ANR rate. We believe these metrics are a better reflection of user experience; and we've seen a stronger correlation to uninstalls.

03: Quality and discovery

Quality as foundational across Play

- **New quality metrics** in Android vitals: more closely track user-impacting issues
 - Crashes >> user-perceived crash rate
 - ANRs >> user-perceived ANR rate
- Continued **overall bad behavior thresholds**
- New **per-device bad behavior thresholds**
 - Issues and emerging issues reported in Android vitals
 - Store listing warnings on Play



New per-device bad behavior thresholds

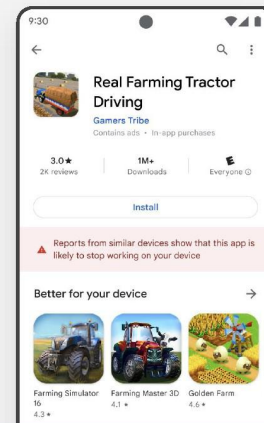
COMING SOON

Technical quality can vary across devices: an app can be stable and smooth for one device model but not another. To account for this, we are introducing a new bad behavior threshold that is evaluated at device model level (e.g. Pixel 6 vs Pixel 7).

03: Quality and discovery

Quality as foundational across Play

- **New quality metrics** in Android vitals: more closely track user-impacting issues
 - Crashes >> user-perceived crash rate
 - ANRs >> user-perceived ANR rate
- Continued **overall bad behavior thresholds**
- New **per-device bad behavior thresholds**
 - Issues and emerging issues reported in Android vitals
 - Store listing warnings on Play



Store listing warnings on Play
(illustrative, text may change)

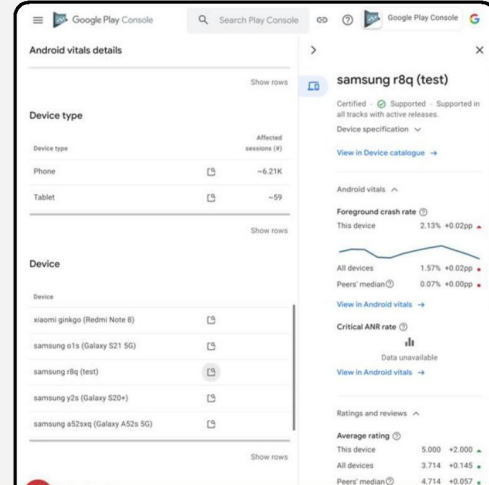
COMING SOON

If your title exceeds device BBT on any core vital, for a given device model, then Play may reduce the visibility of your title for users on that device model, and steer them towards higher quality alternatives. For example, we may exclude the title from some discovery treatments, and in some cases, we will show a warning on your store listing. We will generally look at the last 28 days of data when evaluating your quality, but may act sooner if we detect a spike.

03: Quality and discovery

Quality as foundational across Play

- **New quality metrics** in Android vitals: more closely track user-impacting issues
 - Crashes >> user-perceived crash rate
 - ANRs >> user-perceived ANR rate
- Continued **title bad behavior thresholds**
- New **device-level bad behavior thresholds**
 - Issues and emerging issues reported in Android vitals
 - Store listing warnings on Play



One-click access to device information

AVAILABLE NOW

When making this decision, you will want to take into account both existing users and the opportunity cost or impact on new users. To help with this assessment, we have launched a new feature 'full view of device' in Play Console that gives you one-click access to device information from across Play - including specs, top issues, user ratings and reviews, and install base - without leaving the page that you are on. We hope this information will make it quicker and easier for you to troubleshoot and prioritise.

Exhibit A16

Public Redacted Version

EXHIBIT 34

NTK google confidential
attorney client privileged
created to get attorney advice

Policy timeline and everest

NTK google confidential
attorney client privileged
created to get attorney advice

India landscape

[REDACTED]
[REDACTED]
[REDACTED]
[REDACTED]

Critical features landing after March: [fix](#) for lost buyflow sessions UPI for subs ,EWallets - PayTM.

Question: is everest the path that will help in India with categories like matrimony that are not solved by current programs

[REDACTED]

If we delay we could optionally align JUST IN to Everest timeline

NTK google confidential
attorney client privileged
created to get attorney advice

March for GPB and Jun-Jul for Everest

March date for Non compliant devs to be complaint, hold in the light of Everest

Today we have two types of developers

1. Compliant developers : we are enforcing GPB policy
2. Non Compliant Apps developers: we have given a grace period upto March 2022 for developers to integrate with GPB system

As Everest lands, there will be new additional API's for developers to integrate that will not be available before Jan- Feb 2022.

For a developer, that is complaint today: No change we assert that they need to continue to be compliant with GPB policy. When new Everest API comes out they can choose to do the extra work for that or stay on GPB

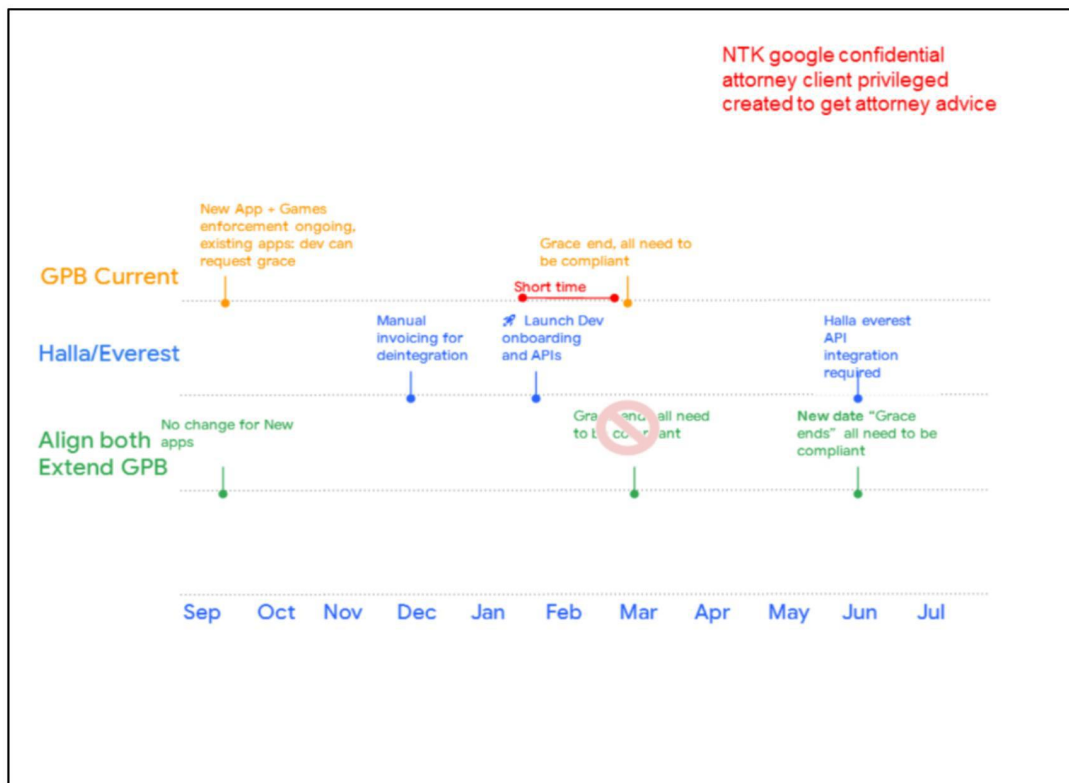
However for developers that are not compliant: We mandate that they be working towards the March date. However, Everest optionality lands in Jan.

NTK google confidential
attorney client privileged
created to get attorney advice

Messaging

If India only change

FOP coverage was the reason for extra time for india, we can stay in the same message theme.



NTK google confidential
attorney client privileged
created to get attorney advice

Timeline - UPI for subs

MUST HAVE for India

- Dependencies - EOQ Q4
 - Lost buyflow sessions (UPI workstream only): Q4 code complete
 - Payments readiness for UPI : Q4
 - TBD: Adding Pending state to PBL 4.0 (may not need this)
- Commerce work for UPI - EOQ Q2
 - Start in Q4 (PRD)
 - Eng complete ~EOQ2 (dependent on additional resourcing landing in Q4)

Id	Date	Text
1	09/08/2021 20:22:06	<p>since this will likely spill to 2022 it will come close to PBL 5 (google confidentially)</p> <p>we need to discuss whether a PBL 4.2 makes sense before that (PBL 4.1 is launching soon with in-app messaging support)</p>
1	09/08/2021 20:22:06	<p>We should align on this in leads i thought it is I/O goal PBL 5 but ray is under the impression that this is still v4</p>
1	09/08/2021 22:24:38	<p>This slide doesn't show UPI for recurring does it?</p> <p>But in any case, UPI for recurring isn't new, but it wasn't actually available to launch until fairly recently. So there was no action we could take a year ago. It's now available for integration with NPCI. This is something that Devs have been asking about for over a year now even though it wasn't available to anyone at that time.</p>
2	09/08/2021 22:32:51	<p>UPI support for prepaid is on track to start/deliver in Q4 so I assume this is only an issue with recurring.</p> <p>Do you mean that, now the NPCI has allowed/enabled UPI for recurring payments, developers would expect any billing system to have it available for them and therefore making this urgent and a blocker?</p>
2	09/08/2021 22:53:28	<p>Yes it's only an issue with recurring. Recurring (called autopay by NPCI) wasn't allowed at all until earlier this year. Nothing was stopping us from using UPI for prepaid (via one time payments).</p> <p>And yes that's exactly the POV of developers.</p>
3	09/08/2021 23:04:12	<p>@zhouji@google.com</p> <p>Are all other things on Subscription team really higher priority than UPI for recurring then?</p> <p>We have probably discussed it but I at least didn't have the full context. Should we drop other Subscription team work so we can work on UPI for recurring then?</p> <p>Seems like this would be higher priority than prepaid and potentially other things that are only needed for selected/top partner?</p>

NTK google confidential
attorney client privileged
created to get attorney advice

Summary

Need to investigate "GPB policy compliance" date for two reasons

1. For Non compliant devs, overlap with halla/everest
2. For India due to UPI/ewallet timeline

Proposal: for non compliant devs, move the deadline for compliance to July. no change for compliant devs.

Exhibit A17

Public Redacted Version

EXHIBIT 41

HIGHLY CONFIDENTIAL

Page 1

UNITED STATES DISTRICT COURT
FOR THE NORTHERN DISTRICT OF CALIFORNIA
SAN FRANCISCO DIVISION

-----x
IN RE GOOGLE PLAY STORE Case No.
ANTITRUST LITIGATION 3:21-md-02981-JD

THIS DOCUMENT RELATES TO:

Match Group, LLC et al. v. Google LLC et al.,
Case No. 3:22-cv-02746-JD

Epic Games Inc. v. Google LLC et al.,
Case No. 3:20-cv-05671-JD

In re Google Play Consumer Antitrust
Litigation, Case No. 3:20-cv-05761-JD

In re Google Play Developer Antitrust
Litigation, Case No. 3:20-cv-05792-JD

State of Utah et al. v. Google LLC et al.,
Case No. 3:21-cv-05227-JD
-----x

** HIGHLY CONFIDENTIAL - UNDER PROTECTIVE ORDER **

REMOTE VIDEOTAPED DEPOSITION OF
SARAH KARAM
Wednesday, September 28, 2022

REPORTED BY:

RENEE HARRIS, CA CSR 14168, NJ CCR, RPR

HIGHLY CONFIDENTIAL

Page 2

UNITED STATES DISTRICT COURT
FOR THE NORTHERN DISTRICT OF CALIFORNIA
SAN FRANCISCO DIVISION

-----x
IN RE GOOGLE PLAY STORE Case No.
ANTITRUST LITIGATION 3:21-md-02981-JD

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In re Google Play Consumer Antitrust
Litigation, Case No. 3:20-cv-05761-JD

In re Google Play Developer Antitrust
Litigation, Case No. 3:20-cv-05792-JD

State of Utah et al. v. Google LLC et al.,
Case No. 3:21-cv-05227-JD

-----x
** HIGHLY CONFIDENTIAL - UNDER PROTECTIVE ORDER **

Remote Videotaped Deposition of SARAH
KARAM, appearing from Palo Alto, California, at
9:07 a.m. PDT, on Wednesday, Palo Alto, 2022,
before Renee Harris, California Certified
Shorthand Reporter No. 14168, New Jersey Certified
Court Reporter No. 30XI00241200, and Registered
Professional Reporter.

HIGHLY CONFIDENTIAL

Page 8

1 Wednesday, September 28, 2022

2 9:07 a.m.

3
4 THE VIDEOGRAPHER: We are on the record
5 at 9:07 a.m. on September 28, 2022.

6 Please note that this deposition is being
7 conducted virtually. Quality of recording
8 depends on the quality of camera and Internet
9 connection of participants. What is seen
10 from the witness and heard on screen is what
11 will be recorded. Audio and video recording
12 will continue to take place unless all
13 parties agree to go off the record.

14 This is Media Unit No. 1 of the
15 video-recorded deposition of Sarah Karam
16 taken by counsel for the plaintiffs in the
17 matter of Match Group LLC et al. v. Google
18 LLC, et al., filed in the United States
19 District Court for the Northern District of
20 California, Case Number Case No.
21 3:22-cv-02746-JD.

22 This deposition is being conducted
23 remotely using virtual technology. My name
24 is Steven Togami representing the firm
25 Veritext Legal Solutions; I am the

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Page 9

1 videographer. The court reporter is Renée
2 Harris from the firm Veritext Legal
3 Solutions.

4 I am not related to any party in this
5 action, nor am I financially interested in
6 the outcome.

7 If there are any objections to
8 proceeding, please state them at the time of
9 your appearance.

10 At this time, will counsel and all
11 present please state their appearances and
12 affiliations for the record, starting with
13 the noticing party.

14 MR. DIXON: Doug Dixon of Hueston
15 Hennigan for the Match Plaintiffs, and I'm
16 joined by my colleague, Will Larsen.

17 MS. NARANJO: Do all the plaintiffs want
18 to go?

19 MR. WALCHAK: This is David Walchak for
20 the consumer plaintiffs from Korein Tillery.

21 MS. ULRICH: Ashley Ulrich, Cravath
22 Swaine & Moore for Epic Games, and with me is
23 my colleague, Malukah Williams.

24 MS. NARANJO: This is Minna Naranjo from
25 Morgan Lewis & Bockius, joined by Nina Dutta,

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Page 10

1 also from Morgan Lewis & Bockius, and Kathlyn
2 Querubin from Google representing the Google
3 Defendants and the witness.

4
5 SARAH KARAM,
6 called as a witness and having been first duly
7 sworn by the Certified Shorthand Reporter, was
8 examined and testified as follows:

9
10 EXAMINATION

11
12 BY MR. DIXON:

13 Q. Good morning, Ms. Karam. How are you?

14 A. Good morning. I'm doing well. How are
15 you?

16 Q. I'm doing well, thanks.

17 So my name is Doug Dixon as you just
18 heard. I represent the Match Plaintiffs which own
19 and operate several dating apps which I believe
20 you are most likely familiar with; Tinder,
21 Match.com, PlentyofFish, OkCupid and OurTime. I
22 may refer to those brands individually today or I
23 may refer to the Match Plaintiffs.

24 Would that be okay?

25 A. Yes.

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Page 11

1 Q. Could you please state your full name for
2 the record.

3 A. Yes, Sarah Karam.

4 Q. And what is your city and state of
5 residence?

6 A. My city and state of residence is
7 Sunnyvale, California.

8 Q. And I believe earlier you mentioned that
9 you are currently in Palo Alto, California.

10 A. Correct.

11 Q. Is that correct?

12 And are you physically at an office of
13 outside counsel?

14 A. Yes.

15 Q. And what law firm is that?

16 A. Morgan Lewis.

17 Q. Is there anyone else in the room with you
18 currently?

19 A. No.

20 Q. Do you have any physical documents with
21 you today?

22 A. I do not.

23 Q. Now, because this is a remote deposition,
24 I want to confirm a few other things.

25 Do you understand that you are not

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Page 148

1 points that they should be including if they were
2 to assess the value of Play.

3 Q. So the answer to my question, Ms. Karam,
4 is "no," Google did not share that information
5 with Tinder?

6 A. Correct.

7 Q. Do you think Tinder would have been
8 interested in that analysis?

9 A. I think Tinder already wanted to share
10 and -- consistently shared with us as we invited
11 with them to share feedback that they felt like
12 Play was not delivering the value that they looked
13 for and they were very concerned about maximizing
14 their margins and revenue.

15 Q. So the answer to my question is: "Yes,"
16 you believe Tinder would have been interested in
17 that analysis showing [REDACTED]

18 A. Sure, but again, I don't think that
19 analysis would be complete.

20 Q. You could have explained that to Tinder
21 if you shared that with them, right -- strike
22 that.

23 So it wasn't -- strike that.

24 Google did not begin enforcing its
25 payments policy until April 1, 2022; correct?

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Page 149

1 A. We announced in end of 2020, that we were
2 planning to consistently enforce our policy in a
3 year-ish, and then we added an ability to extend,
4 to apply for an extension for those who had the
5 intention to come into compliance until April
6 2022.

7 Q. I'm not trying to be difficult. I'm just
8 trying to cut to the chase on some of this.

9 So is it correct that Google did not
10 begin enforcing its payments policy until April 1,
11 2022?

12 A. Not quite. Google consistently began
13 enforcing its policy across apps and games in
14 April 2022.

15 Q. Prior to that time, it did not -- it was
16 not in a position to mandate that apps like Tinder
17 used Google Play Billing under its policy; right?

18 A. We believed it made -- it was the right
19 thing to do for partners, to give them more time
20 and to clarify the language before we did that,
21 correct.

22 Q. Google did not begin enforcing its Google
23 Play Billing policy as to the Match Plaintiffs
24 until April 2022, how's that?

25 A. Correct.

HIGHLY CONFIDENTIAL

Page 150

1 MR. DIXON: I'm going to introduce Tab 15
2 and we are going to mark that as
3 Exhibit 1989.

4 And while you download Exhibit 1989, for
5 the record, it's GOOG-PLAY-011226100 through
6 6103, and it's an e-mail chain with the last
7 e-mail being sent by Ms. Karam on September
8 6, 2019 to Brett Bouchard and others.

9 (Exhibit 1989 was received and marked
10 for identification on this date and is
11 attached hereto.)

12 BY MR. DIXON:

13 Q. And my first question about Exhibit 1989,
14 once you've had a chance to review it is, is
15 Exhibit 1989 an e-mail that you sent in the
16 ordinary course of your responsibilities at
17 Google?

18 A. I'm just taking a look.

19 Yes, to answer your question.

20 Q. So the subject line of Exhibit 1989 is
21 "Content Taxonomy List of Strategic Partners."

22 Correct?

23 A. Correct.

24 Q. And do you recall having a discussion
25 around the fall of 2019 about strategic partners

HIGHLY CONFIDENTIAL

Page 255

1 for identification on this date and is
2 attached hereto.)

3 BY MR. DIXON:

4 Q. By the way, looking back again at
5 Exhibit 1603, Google told Peter Foster that his
6 request for an extension as contained in
7 Exhibit 1603 was not made in the proper form;
8 right?

9 A. I'm looking back at 1603. Could you
10 refer me to where you're -- where you're pointing
11 at?

12 Q. So -- sure. If you look at the page
13 ending in Bates 6745, Brandon tells Peter,
14 [as read]: "That he'll need to fill out a form,"
15 and unfortunately as you continue on, Brandon
16 says, [as read]: "You can't do it in a single
17 batch for all apps of a single brand; right?"

18 A. Correct. We didn't allow any developers
19 who had multiple apps to submit one single form.
20 Even developers with over 30 or 40 apps had to
21 submit a separate form for each app.

22 Q. So Mr. Foster's request in 1603 was not
23 an effective request for an extension under the
24 policy?

25 A. Sorry, his request for one form?

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Page 256

1 Q. No, Mr. Foster's request in Exhibit 1603
2 was not an effective request to receive an
3 extension of the -- an extension to March, the end
4 of March 2022; right?

5 A. To receive an extension, as Brandon
6 responded to Peter, a developer would need to
7 submit a form.

8 Q. So is it fair to say Google didn't do
9 anything based on Mr. Foster's request in
10 Exhibit 1603?

11 A. Sorry, just to be 100 percent clarifying
12 in your question, Google did not do what, sorry?

13 Q. Google did not rely upon Mr. Foster's
14 request in Exhibit 1603; is that correct?

15 A. Correct, that Google required, per
16 Brandon's e-mail, that Match submit a form for
17 each app to be officially granted an extension and
18 be approved that way.

19 Q. So looking now at Exhibit 1996, this
20 appears to be a submission by Match.com LLC using
21 Google's form for app extension dated August 19th,
22 2021 and responses to that request; is that
23 accurate?

24 A. Yes.

25 Q. And there are a couple questions that a

HIGHLY CONFIDENTIAL

Page 257

1 developer had to answer in connection with
2 requesting the extension; right?

3 A. Correct.

4 Q. And the contact name for Match.com LLC is
5 identified as Casey Daniell; right?

6 A. Yes.

7 Q. And what we see here in Exhibit 1996,
8 this is, in essence, the form that Brandon Barras
9 was referring to in Exhibit 1603; right?

10 A. That's correct.

11 Q. So this was the form that Google used to
12 evaluate whether to grant an extension to the new
13 deadline of March 21st, 2022; right?

14 A. Correct.

15 Q. And it seems like the e-mail or -- strike
16 that.

17 The first -- the request was submitted on
18 August 19th, 2021 at 3:19 p.m. according to the
19 first entry on page ending in Bates 7123 of
20 Exhibit 1996; correct?

21 A. It looks like -- I can't tell if the
22 e-mail -- the time stamp is a little confusing.
23 But yes, the request and the e-mail have the same
24 time stamp.

25 Q. And then there's an automated response,

HIGHLY CONFIDENTIAL

Page 258

1 it looks like, sent at the exact same time saying,
2 [as read]: "Thanks for contacting us, we received
3 the request, and will reply as soon as possible."
4 Correct?

5 A. Correct.

6 Q. And then there's a later response at
7 August 21st, 2021 at 12:32 a.m., that, "Thanks,
8 Casey Daniell, for the submission," and indicates
9 that Match.com LLC is eligible for the extension
10 until March 31st, 2022; correct?

11 A. Yes, an extension until March 22 to come
12 into compliance with Google Play's payment policy,
13 yes.

14 Q. And did Google rely on Mr. Daniell's
15 submission about how to invest in its business in
16 any way?

17 A. Sorry, how to invest in Match's business?

18 Q. No, in Google's business.

19 A. Did Google rely on Casey Daniell's
20 submission for how to invest in Google's business?

21 Q. Correct.

22 A. Can you add another layer of clarity for
23 me? I'm not sure what you mean by, "invest in our
24 business."

25 Q. Did Google make any decisions with

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Page 263

1 So yes, I read this statement. I don't
2 think it reflects other conversations and feedback
3 that we heard from Match previously.

4 Q. Google didn't ask for any clarification
5 in response to that statement, did it?

6 A. This form was intended to record and it
7 was used to grant extensions for those who were
8 working in good faith to come into compliance with
9 our policies. It was not intended to be a
10 partnerships back-and-forth or a product feedback
11 form. That wasn't the purpose of the form. It
12 was for our policy team.

13 Q. My question was a little different,
14 respectfully. I simply said: Google didn't ask
15 for clarification in response to Mr. Daniell's
16 submission; correct?

17 A. Not in this form, no.

18 Q. And Casey did get a specific response
19 from Danmar; right?

20 A. Correct.

21 Q. And Danmar is somebody who works for
22 Google?

23 A. I believe Danmar is on our policy --
24 policy vendor team.

25 Q. So now let's turn back -- actually,

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Page 264

1 before we go there, so I think you testified that
2 Google relied upon Mr. Daniell's statement in
3 granting an extension to Match.com LLC; correct?

4 A. Correct.

5 Q. Did Google rely on Mr. Daniell's
6 statement in making any other decisions?

7 MS. NARANJO: Object to form.

8 THE WITNESS: Can you please be more
9 specific on what decisions you're referring
10 to?

11 BY MR. DIXON:

12 Q. Yeah, did Google rely on Mr. Daniell's
13 e-mail, say, for deciding how to allocate, I don't
14 know, internal resources or anything like that?

15 A. Our -- the way Google viewed
16 Mr. Daniell's statement and then subsequent grant
17 of the extension and the way we interpreted that
18 was to continue working with Match towards
19 compliance.

20 Q. I'm not sure that quite answered my
21 question.

22 I guess, again, did Google rely on
23 Mr. Daniell's request in the e-mail or the
24 submission deciding how to allocate internal
25 resources?

HIGHLY CONFIDENTIAL

Page 265

1 A. No, because that wasn't -- that wasn't an
2 expectation off any -- any submission of these
3 forms.

4 Q. All right. If you'll turn back to
5 Exhibit 1994, which is Google's Answer.

6 A. Yeah.

7 Q. And I want to look at page, on the bottom
8 footer, No. 46. And there's a section about a
9 third from the top saying, "Count III, False
10 Promise."

11 Do you see that?

12 A. I do.

13 Q. And if you look at the paragraph No. 70,
14 it says, [as read]: "Match Group's specific
15 misrepresentations regarding its intention to
16 comply with the DDA include the August 2021
17 request of Peter Foster for an extension."

18 Do you see that?

19 A. I do.

20 Q. And the reference there to that August
21 2021 request of Peter Foster is Exhibit 1603;
22 right?

23 A. The e-mail from Peter to Brandon?

24 Q. Correct.

25 A. Yes. I believe so.

HIGHLY CONFIDENTIAL

Page 266

1 Q. And then it goes on and says, [as read]:
2 "Match Group's further representation later in
3 August 2021 that it was updating its apps to
4 comply with the DDA and Google's payment policy."

5 Do you see that?

6 A. I do.

7 Q. And that says, as we go on, [as read]:
8 "Including, for example, an August 19, 2021
9 communication from Casey Daniell on behalf of
10 Match.com LLC." Right?

11 A. I do.

12 Q. And that is referring to Exhibit 1996;
13 right?

14 A. I believe so.

15 Q. And then if you look at exhibit -- do you
16 know of any other communications that's being
17 referred to in paragraph 70?

18 A. From Casey Daniell? I'm not aware of any
19 other communication.

20 Q. And I'm sorry, thank you.

21 Are you aware of any other communications
22 that form the basis of the allegation in paragraph
23 70?

24 A. I'm not aware of any specific written
25 communication. There may have been calls between

HIGHLY CONFIDENTIAL

Page 321

1

2

9/28/2022 - KIRSTEN RASANEN

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E R R A T A S H E E T

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18

REASON _____

19

PAGE _____ LINE _____ CHANGE _____

20

21

REASON _____

22

23

24

KIRSTEN RASANEN

Date _____

25

HIGHLY CONFIDENTIAL

Page 323

1 STATE OF CALIFORNIA)

2) ss.

3 COUNTY OF LOS ANGELES)

4 I, RENEE HARRIS, do hereby certify that I
5 am a licensed Certified Shorthand Reporter, duly
6 qualified and certified as such by the State of
7 California;

8 That prior to being examined, the witness named
9 in the foregoing deposition was by me duly sworn
10 to testify to tell the truth, the whole truth, and
11 nothing but the truth;

12 That the said deposition was by me recorded
13 stenographically;

14 And the foregoing pages constitute a full,
15 true, complete and correct record of the testimony
16 given by the said witness;

17 That I am a disinterested person, not
18 being in any way interested in the outcome of said
19 action, or connected with, nor related to any of
20 the parties in said action, or to their respective
21 counsel, in any manner whatsoever.

22 DATED: September 29, 2022

23



24

Renee Harris, CSR, CCR, RPR

CA CSR No. 14168,

25

NJ CRR No. 30XI00241200

Exhibit A18

Public Redacted Version

EXHIBIT 44

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Page 1

UNITED STATES DISTRICT COURT
FOR THE NORTHERN DISTRICT OF CALIFORNIA
SAN FRANCISCO DIVISION

-----x
IN RE GOOGLE PLAY STORE Case No.
ANTITRUST LITIGATION 3:21-md-02981-JD

THIS DOCUMENT RELATES TO:

Match Group, LLC et al. V. Google LLC et al.,
Case No. 3:22-cv-02746-JD

Epic Games Inc. V. Google LLC et al.,
Case No. 3:20-cv-05671-JD

In re Google Play Consumer Antitrust
Litigation, Case No. 3:20-cv-05761-JD

In re Google Play Developer Antitrust
Litigation, Case No. 3:20-cv-05792-JD

State of Utah et al. V. Google LLC et al.,
Case No. 3:21-cv-05227-JD

-----x
** HIGHLY CONFIDENTIAL - UNDER PROTECTIVE ORDER **

REMOTE VIDEOTAPED DEPOSITION OF
DANIELLE STEIN
Friday, October 28, 2022

REPORTED BY:

RENEE HARRIS, CA CSR 14168, NJ CCR, RPR

HIGHLY CONFIDENTIAL

Page 8

Friday, October 28, 2022

9:02 a.m.

THE VIDEOGRAPHER: Good morning. We are going on the record at 9:02 a.m. Pacific Time, on Friday, October 28th, 2022.

Please note that this deposition is being conducted virtually. Quality of the recording depends on the quality of the camera and the Internet connection of participants. What is heard from the witness and seen on screen is what will be recorded. Audio and video recording will continue to take place unless all parties agree to go off the record.

This is Media Unit 1 of the video-recorded deposition of Danielle Stein in the matter of In re: Google Play Store Antitrust Litigation v. Google Inc., et al., filed in the United States District Court, Northern District of California, case number 3:22-cv-02746-JD.

My name is Craig Jones, and I am the videographer. The court reporter is Renée Harris. And we are from the firm Veritext

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Page 9

1 New York.

2 I am not authorized to administer an
3 oath; I am not related to any party in this
4 action; nor am I financially interested in
5 the outcome. If there are any objections to
6 proceeding, please state them at the time of
7 your appearance.

8 Counsel and all present, including
9 remotely, will now state their appearance and
10 affiliation for the record, beginning with
11 the noticing attorney.

12 MR. DIXON: Doug Dixon of Heuston
13 Hennigan for the Match Plaintiffs; and with
14 me is my colleague, Julia Haines.

15 MS. NARANJO: Are there any other
16 Plaintiffs?

17 MR. MASON: Good morning. Lee Mason from
18 Bartlit Beck on behalf of the Consumer
19 Plaintiffs.

20 MR. ALTEBRANDO: Good morning. This is
21 Michael Altebrando for the Utah Attorney
22 General and the Plaintiff States.

23 MS. KLOSS: Good morning. This is Lauren
24 Kloss from Cravath, Swaine & Moore on behalf
25 of Epic Games.

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Page 10

1 MS. NARANJO: And this is Minna Naranjo
2 from Morgan, Lewis & Bockius, representing
3 the witness and Google. I also have Nina
4 Dutta from Morgan Lewis.

5 THE WITNESS: Should I also introduce
6 myself?

7 THE VIDEOGRAPHER: Ms. Harris will swear
8 you in.

9 At this time, will the court reporter
10 please swear in the witness.

11 (Witness duly sworn by the Certified
12 Shorthand Reporter.)

13 THE VIDEOGRAPHER: Counsel, you may
14 proceed.

15
16 DANIELLE STEIN,
17 called as a witness and having been first duly
18 sworn by the Certified Shorthand Reporter, was
19 examined and testified as follows:

20
21 EXAMINATION

22
23 BY MR. DIXON:
24 Q. Good morning, Ms. Stein.

25 My name is Doug Dixon, and I represent

HIGHLY CONFIDENTIAL

Page 11

1 the Match Plaintiffs in this litigation. The
2 Match Plaintiffs own and operate various apps that
3 you may be familiar with, such as Tinder,
4 Match.com, Plenty of Fish, OurTime, and OkCupid.

5 I may refer to them throughout the course
6 of the day as the "Match Plaintiffs." And if I do
7 so, will you understand whom I'm referring to?

8 A. Yes.

9 Q. I may also identify some of the brands by
10 name. And I assume, again, you're familiar with
11 brands like Tinder or OkCupid?

12 A. Yes.

13 Q. Will you please state your full name for
14 the record?

15 A. Danielle Stein.

16 Q. And what is the city and state of your
17 residence?

18 A. Menlo Park, California.

19 Q. And where are you located right now?

20 A. Palo Alto, in the offices of Morgan
21 Lewis.

22 Q. And is there anyone else in the immediate
23 room with you?

24 A. No.

25 Q. Do you have any documents with you?

HIGHLY CONFIDENTIAL

Page 164

1 opposed to directing the discussion -- like the
2 preparation for the discussions?

3 Q. Yes.

4 A. Probably, like, summer 2021.

5 Q. So was it after -- it was after the
6 announcement of the change?

7 A. Right.

8 Q. So prior to September of 2020, you didn't
9 have any direct contact with anyone at Match Group
10 regarding the change; is that accurate?

11 A. That's my recollection.

12 Q. And the first time you would have had
13 direct contact with anyone at Match Group
14 regarding the announced change was Peter Foster
15 sometime in the summer of 2021?

16 A. That's my recollection.

17 Q. And was your conversations with -- or
18 conversation with Peter Foster, did that relate to

19 [REDACTED]

20 A. When I spoke to Peter Foster, we covered
21 a range of topics over the multiple times we spoke
22 or exchanged e-mail. Sometimes it was about [REDACTED]
23 But he would share with me his view on our policy
24 or on our -- anything we announced publicly,
25 whether it was like a new program or a new service

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Page 165

1 fee. So he was pretty -- and his feedback on our
2 business model. So we've discussed a -- wide
3 range of topics.

4 Q. How would you generally describe Peter's
5 feedback on Google Play's business model, based
6 upon your personal interactions with him?

7 A. Pretty consistent with the feedback we
8 received over the years from other points of
9 contact. They were pretty consistent, no matter
10 who was delivering it from Match.

11 Q. And what was that feedback?

12 A. They were frustrated that we were only
13 charging a service fee for the -- for digital
14 goods and not physical goods. They were
15 frustrated -- they were frustrated that a small
16 number of developers were paying when a large
17 number of developers were receiving various
18 services from Play. They were frustrated with the
19 number of the -- the service fee. And they had
20 feedback on capabilities in Google Play Billing
21 that they felt were missing compared to their own
22 platform.

23 Q. With respect to that last item, are you
24 referring there to feature gaps between Match's
25 own payment processor versus features in Google

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Page 166

1 Play Billing?

2 A. Right.

3 They took it app by app. So they had --
4 they have a few -- it seems to me that because
5 over the years they have consolidated a number of
6 different businesses, that there's a few systems,
7 perhaps, that different apps rely on, maybe
8 different clusters of apps.

9 And so certain apps or app team,
10 development teams, would identify certain features
11 as a difference between what they had available
12 and what Google Play Billing had available.

13 So when taken as a whole, we'd have to
14 look across all those various apps to compile one
15 view for Match Group.

16 Q. And do you recall that one of the
17 features -- strike that.

18 Do you recall that one of the feature
19 gaps Google Play Billing wasn't offering included
20 installment payments?

21 A. I do.

22 And we have been talking to them to try
23 to understand it and scope it out since even I was
24 a product specialist.

25 Q. And even today, [REDACTED] are

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Page 230

1 want to know if you're familiar with it and
2 if you can identify it.

3 And I'm going to mark it as PX 2639.

4 And while that is uploading and then you
5 are going to download it, for the record, PX
6 2639 is a document Bates-stamped
7 GOOG-PLAY-007875565 through 0095.

8 (Exhibit 2639 was received and marked
9 for identification on this date and is
10 attached hereto.)

11 BY MR. DIXON:

12 Q. Let me know once you've had an
13 opportunity to download it.

14 A. I'm opening it and scrolling through it.

15 Q. And as you do so, my first question is
16 just going to be: Do you recognize Exhibit PX
17 2639, which on the first page is entitled "Billing
18 Policy Landing

19 "Update on in-app comms policy

20 "May 2021?"

21 A. Yeah. I'm starting to recognize it.

22 Q. Is PX 2639 a document that you
23 contributed to?

24 A. Yes.

25 Q. And it seems to incorporate some of the

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Page 231

1 ideas that you were exploring in PX 2638; right?

2 A. Right.

3 Q. And is PX 2639 a document that was
4 created in the ordinary course of business at
5 Google?

6 A. Yes.

7 Q. I don't have any further questions about
8 PX 2639, so you can put that away.

9 When Google announced an extension of
10 compliance with the policy, the payments policy,
11 to end of March 2022, the position of Google was:
12 Either you comply with the policy change or
13 clarification, or we're going to delist you from
14 the Play Store; right?

15 A. Sorry. Do you mean in September or --
16 could you clarify the question?

17 Q. So Google set a deadline ultimately of
18 March 31st, 2022, for compliance -- for compliance
19 with the payments policy; right?

20 A. The deadline was for September 30th,
21 2021, but you could apply for an extension if you
22 needed more time. And if you applied for the
23 extension, then the deadline -- and this is for --
24 this excludes India and I believe Korea as well.
25 And if you applied for the extension, then you

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Page 232

1 would have an extension until end of March.

2 Q. And for those who applied and received an
3 extension, the compliance deadline was March 31st,
4 2022; correct?

5 A. Correct. Outside of India and Korea.

6 Q. And Google's position was that if you
7 didn't comply by March 31st, 2022, first, we would
8 reject any updates of apps that were not in
9 compliance; correct?

10 A. I don't know. Do you mean what we stated
11 publicly? Because I'm not -- I don't remember
12 what guidance we publicly gave about how the
13 enforcement would work.

14 Q. Do you recall, though, that ultimately
15 the enforcement would be, if you're out of
16 compliance with the new payments policy, we'll
17 delist you from the Play Store?

18 A. I don't believe we were specific about
19 what the enforcement would be in our public
20 commentary; but I don't recall for sure.

21 Q. Are you aware of any apps that were
22 delisted from the Play Store as a result of
23 refusing to comply with the new payments policy
24 announced in September of 2020?

25 A. I'm not personally aware, but it's not

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Page 233

1 really my -- it wouldn't be in my job, normal
2 course, to be notified. So me not being aware
3 doesn't really indicate whether it's happened or
4 not.

5 Q. You're not aware of any of the apps or
6 brands that you worked with that were delisted
7 from the Play Store as a result of refusing to
8 comply with the policy?

9 A. That's accurate.

10 Q. Other than Match Group brands, are you
11 aware of any brands that you work with that have
12 resisted complying with the new policy announced
13 in September of 2020?

14 A. None of the ones in my portfolio.

15 Q. Was LinkedIn within your portfolio?

16 A. No.

17 Q. Were you involved in negotiations with
18 Spotify?

19 A. Yes.

20 Q. And Google publicly announced a special
21 deal with Spotify in the spring of 2022, described
22 as a "user-choice pilot program"; is that correct?

23 A. A "user-choice billing pilot," yes.

24 Q. And that applied to Spotify across the
25 world, right, including in the United States?

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Page 247

1 STATE OF CALIFORNIA)
2) ss.
3 COUNTY OF LOS ANGELES)

4 I, RENEE HARRIS, do hereby certify that I
5 am a licensed Certified Shorthand Reporter, duly
6 qualified and certified as such by the State of
7 California;

8 That prior to being examined, the witness named
9 in the foregoing deposition was by me duly sworn
10 to testify to tell the truth, the whole truth, and
11 nothing but the truth;

12 That the said deposition was by me recorded
13 stenographically;

14 And the foregoing pages constitute a full,
15 true, complete and correct record of the testimony
16 given by the said witness;

17 That I am a disinterested person, not
18 being in any way interested in the outcome of said
19 action, or connected with, nor related to any of
20 the parties in said action, or to their respective
21 counsel, in any manner whatsoever.

22 DATED: October 31, 2022
23



24 Renee Harris, CSR, CCR, RPR
CA CSR No. 14168,
25 NJ CRR No. 30XI00241200

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Page 249

1 GOOGLE PLAY STORE ANTITRUST LITIGATION

2 10/28/2022 - Danielle Stein (#5518886)

3 E R R A T A S H E E T

4 PAGE _____ LINE _____ CHANGE _____

5 _____

6 REASON _____

7 PAGE _____ LINE _____ CHANGE _____

8 _____

9 REASON _____

10 PAGE _____ LINE _____ CHANGE _____

11 _____

12 REASON _____

13 PAGE _____ LINE _____ CHANGE _____

14 _____

15 REASON _____

16 PAGE _____ LINE _____ CHANGE _____

17 _____

18 REASON _____

19 PAGE _____ LINE _____ CHANGE _____

20 _____

21 REASON _____

22 _____

23 _____

24 Danielle Stein

Date

25

Exhibit A19

Public Redacted Version

EXHIBIT 1

Case 8-8294000031717 • Requesting Additional Time to Comply with Google Play's Payments Policy

Item types: Important actions, Consults, Customer communication, ... ▼

Thu, Aug 19, 2021, 3:19 PM

Contact Us Form

First name

Casey

Last name

Daniell

Contact email

[REDACTED]

Google Play developer account name

Match.com LLC

Play Console login email

[REDACTED]

Application package name

[REDACTED]

Only apps published before January 20, 2021 are eligible for this extension. Was this app first published before January 20, 2021?


Yes

This extension is intended to aid developers that need more time to comply with Google Play's Payments policy. Do you need more time to comply with Google Play's Payments policy?

Yes

Please explain why you need additional time to comply with Google Play's Payments policy.

Our bespoke payment system is critical to our user experience. Due to significant feature gaps (payment/subs/discounts), Google's system is not a suitable substitute and exclusive use of Google's systems will meaningfully harm our users (inflate prices) & undermine our business

View Contact Us Form 
 FORWARD REPLY

G

From: googleplay-developer-support@google.com

Thu, Aug 19, 2021, 3:19 PM

To: casey.daniell@gmail.com

Re: Payment Extension Form Application - Auto Response [8-8294000031717]

Thanks for contacting the Google Play team. We received your request for additional time to bring your app into compliance with the Google Play Billing policy. We'll reply as soon as possible; there is no need to submit a follow-up request.

Thanks for your patience and continued support of Google Play.

Exhibit
PX 1996
 Sarah Karam

G

From: googleplay-developer-support@google.com

Sat, Aug 21, 2021, 12:32 AM

To: casey.daniell@gmail.com

Re: Your message about Google Play [8-8294000031717]

Hi Casey,

Thanks for submitting a request for additional time to integrate Google Play Billing for your app, com.match.android.matchmobile.

We've reviewed the information in your application form and determined your app is eligible for an extension until **March 31, 2022** to come into compliance with Google Play's Payments policy. No further action is required at this time.

Thanks for your continued support of Google Play.

Regards,
Danmar
The Google Play Team

Please visit the Google Play [Developer Policy Center](#) and Google Play's [Academy for App Success](#) to learn more about building policy compliant and high quality apps. You can also visit the [Android Developers Blog](#) for the latest Android and Google Play news for app and game developers.

Requesting Additional Time to Comply with Google Play's Payments Policy

First name

Casey

Last name

Daniell

Contact email

Google Play developer account name

Match.com LLC

Play Console login email

Application package name

Only apps published before January 20, 2021 are eligible for this extension. Was this app first published before January 20, 2021?

Yes

This extension is intended to aid developers that need more time to comply with Google Play's Payments policy. Do you need more time to comply with Google Play's Payments policy?

Yes

Please explain why you need additional time to comply with Google Play's Payments policy.

Our bespoke payment system is critical to our user experience. Due to significant feature gaps (payment/subs/discounts), Google's system is not a suitable substitute and exclusive use of Google's systems will meaningfully harm our users (inflate prices) & undermine our business

FORWARD

REPLY

Exhibit A20

Public Redacted Version

EXHIBIT 2

Case 3-6263000031703 • Requesting Additional Time to Comply with Google Play's Payments Policy

Item types: Important actions, Consults, Customer communication, ... ▼

Mon, Aug 16, 2021, 4:38 PM

Contact Us Form

First name

Micah

Last name

Bloom

Contact email

[REDACTED]

Google Play developer account name

Tinder

Play Console login email

[REDACTED]

Application package name

[REDACTED]

Only apps published before January 20, 2021 are eligible for this extension. Was this app first published before January 20, 2021?


Yes

This extension is intended to aid developers that need more time to comply with Google Play's Payments policy. Do you need more time to comply with Google Play's Payments policy?

Yes

Please explain why you need additional time to comply with Google Play's Payments policy.

Our bespoke payment system is critical to our user experience. Due to significant feature gaps (payment/subs/discounts), Google's system is not a suitable substitute and exclusive use of Google's systems will meaningfully harm our users (inflate prices) & undermine our business

View Contact Us Form 
 FORWARD REPLY


From: googleplay-developer-support@google.com

Mon, Aug 16, 2021, 4:38 PM

To: joe.dao@gotinder.com

Re: Payment Extension Form Application - Auto Response [3-6263000031703]

Thanks for contacting the Google Play team. We received your request for additional time to bring your app into compliance with the Google Play Billing policy. We'll reply as soon as possible; there is no need to submit a follow-up request.

Thanks for your patience and continued support of Google Play.

 FORWARD  REPLY

G

From: googleplay-developer-support@google.com

Tue, Aug 17, 2021, 2:05 AM

To: joe.dao@gotinder.com

Re: Payment Extension Form Application - Auto Response [3-6263000031703]

Hi Micah,

Thanks for submitting a request for additional time to integrate Google Play Billing for your app, com.tinder.

We've reviewed the information in your application form and determined your app is eligible for an extension until March 31, 2022 to come into compliance with Google Play's Payments policy. No further action is required at this time.

Thanks for your continued support of Google Play.

Regards,
Judith
The Google Play Team

Please visit the Google Play [Developer Policy Center](#) and Google Play's [Academy for App Success](#) to learn more about building policy compliant and high quality apps. You can also visit the [Android Developers Blog](#) for the latest Android and Google Play news for app and game developers.

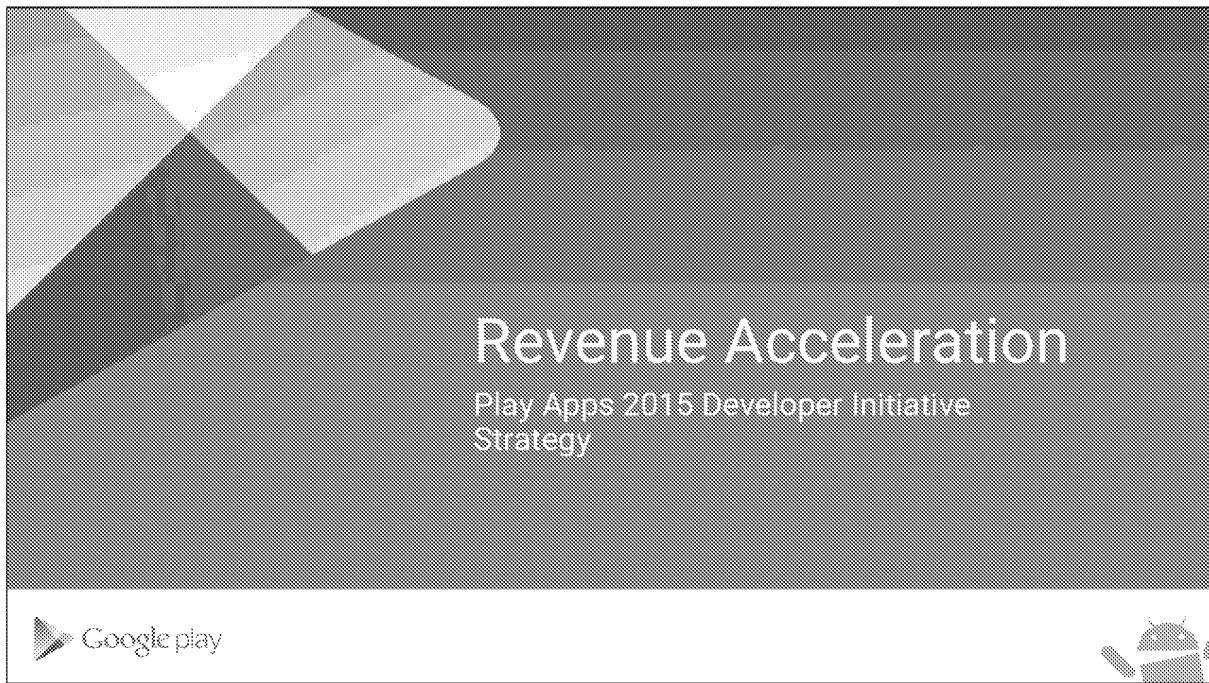
...

FORWARD  REPLY

Exhibit A21

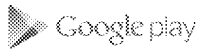
Public Redacted Version

EXHIBIT 8



Contents

- Overview
- High Potential Categories
- High Potential Regions
- Revenue Factors
- Revenue Acceleration Initiatives
- Execution
- Success Metrics



Overview

Play Apps contributed **only 6%** of overall Play revenue in 2014. There is room to improve.

In the top 10 iOS apps markets (excl. China), Play accounts for **less than 20%** of consumer spend. There is room to improve.

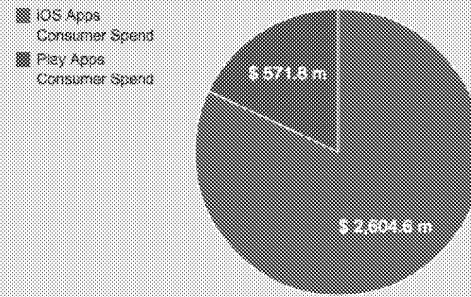
Objective: Increase Play Apps revenue X% in 2015 by accelerating revenue in key categories through strategic and tactical initiatives.

Focus: Focus on highest revenue potential categories, regions and apps by impacting addressable revenue factors.

Proxy: Use revenue gap with iOS as a directional indicator of revenue potential and market size.



2014 Apps Consumer Spend - Top 10 iOS Markets



Source: Extrapolated Q4 2014 App Annie Data to annual



Highest Potential Categories (based on iOS Q4'14 Gap)

- Social (primarily Dating)
- Music & Audio
- Books & Reference
- News & Magazines
- Productivity
- Entertainment

	iOS	Play	Total \$ Gap
Communication and Social	\$ 123.3 m	\$ 47.7 m	\$75,528,727
Music and Audio	\$ 74.0 m	\$ 9.1 m	\$64,891,279
Books and Reference	\$ 48.7 m	\$ 10.5 m	\$38,199,941
News and Magazines	\$ 37.6 m	\$ 2.4 m	\$35,269,448
Productivity	\$ 42.4 m	\$ 7.5 m	\$34,896,695
Entertainment	\$ 43.7 m	\$ 9.8 m	\$33,967,193
Lifestyle	\$ 33.9 m	\$ 3.2 m	\$30,739,775
Navigation and Transportation	\$ 28.0 m	\$ 2.4 m	\$25,591,066
Photo, Video and Media	\$ 33.4 m	\$ 7.8 m	\$25,548,960
Sports	\$ 26.4 m	\$ 4.4 m	\$22,003,561
Health and Fitness	\$ 21.0 m	\$ 4.5 m	\$16,417,849
Business	\$ 20.5 m	\$ 4.2 m	\$16,384,170
Medical	\$ 15.3 m	\$ 2.4 m	\$12,884,545
Tools and Utilities	\$ 22.9 m	\$ 10.8 m	\$12,064,948
Weather	\$ 9.4 m	\$ 1.5 m	\$7,940,424
Finance	\$ 8.4 m	\$ 1.2 m	\$7,225,386
Travel and Navigation	\$ 11.1 m	\$ 6.1 m	\$4,976,707
Catalogs and Shopping	\$ 3.0 m	\$ 0.4 m	\$2,630,179



Source: Q4 2014 App Annie Data



<http://www.counterpointresearch.com/applepulsenov2014>

Highest Potential Regions by Category Gap \$ (Quarterly)										
	AU/NZ	Brazil	CA	DE	FR	GB	IT	Japan	RU	US
Books and Reference	\$ 2.5 m	\$ 1.4 m	\$ 2.1 m	\$ 1.2 m	\$ 1.3 m	\$ 3.0 m	\$ 1.2 m	\$ 10.1 m	\$ 3.1 m	\$ 12.5 m
Business	\$ 1.7 m	\$ 0.9 m	\$ 1.1 m	\$ 1.1 m	\$ 0.9 m	\$ 2.3 m	\$ 0.8 m	\$ 1.1 m	\$ 1.0 m	\$ 5.6 m
Catalogs and Shopping	\$ 0.4 m	\$ 0.2 m	\$ 0.2 m	\$ 0.2 m	\$ 0.2 m	\$ 0.3 m	\$ 0.2 m	\$ 0.2 m	\$ 0.2 m	\$ 0.5 m
Communication and Social	\$ 5.3 m	\$ 1.4 m	\$ 3.8 m	\$ 0.9 m	\$ 5.0 m	\$ 8.3 m	\$ 1.2 m	\$ 17.4 m	\$ 2.9 m	\$ 29.4 m
Education	\$ 2.7 m	\$ 2.3 m	\$ 2.2 m	\$ 2.0 m	\$ 1.5 m	\$ 4.0 m	\$ 1.1 m	\$ 2.6 m	\$ 1.7 m	\$ 20.9 m
Entertainment	\$ 1.9 m	\$ 0.6 m	\$ 1.8 m	\$ 1.8 m	\$ 0.9 m	\$ 2.7 m	\$ 0.5 m	\$ 4.2 m	\$ 2.6 m	\$ 16.9 m
Finance	\$ 0.6 m	\$ 0.5 m	\$ 0.5 m	\$ 0.7 m	\$ 0.6 m	\$ 0.6 m	\$ 0.5 m	\$ 0.6 m	\$ 0.7 m	\$ 1.8 m
Health and Fitness	\$ 1.4 m	\$ 0.5 m	\$ 1.0 m	\$ 0.8 m	\$ 0.8 m	\$ 1.7 m	\$ 0.6 m	\$ 0.6 m	\$ 0.7 m	\$ 8.3 m
Lifestyle	\$ 3.7 m	\$ 1.2 m	\$ 1.9 m	\$ 1.6 m	\$ 1.3 m	\$ 4.1 m	\$ 1.4 m	\$ 4.0 m	\$ 1.3 m	\$ 10.4 m
Medical	\$ 1.3 m	\$ 1.1 m	\$ 1.1 m	\$ 0.9 m	\$ 0.9 m	\$ 1.1 m	\$ 0.7 m	\$ 1.3 m	\$ 0.7 m	\$ 3.6 m
Music and Audio	\$ 3.0 m	\$ 2.6 m	\$ 2.5 m	\$ 2.8 m	\$ 3.4 m	\$ 5.7 m	\$ 1.4 m	\$ 1.6 m	\$ 1.0 m	\$ 40.9 m
Navigation and Transportation	\$ 3.1 m	\$ 1.4 m	\$ 1.5 m	\$ 3.2 m	\$ 2.9 m	\$ 3.2 m	\$ 1.6 m	\$ 1.5 m	\$ 2.3 m	\$ 4.9 m
News and Magazines	\$ 2.7 m	\$ 0.9 m	\$ 1.7 m	\$ 2.9 m	\$ 2.0 m	\$ 5.4 m	\$ 4.5 m	\$ 1.2 m	\$ 0.6 m	\$ 13.4 m
Photo, Video and Media	\$ 1.6 m	\$ 1.4 m	\$ 1.4 m	\$ 1.3 m	\$ 1.1 m	\$ 2.1 m	\$ 1.3 m	\$ 0.9 m	\$ 1.5 m	\$ 13.0 m
Productivity	\$ 2.1 m	\$ 1.1 m	\$ 2.1 m	\$ 1.9 m	\$ 1.3 m	\$ 3.5 m	\$ 1.2 m	\$ 1.5 m	\$ 1.3 m	\$ 18.8 m
Sports	\$ 2.7 m	\$ 0.9 m	\$ 1.3 m	\$ 0.9 m	\$ 1.1 m	\$ 3.0 m	\$ 0.9 m	\$ 1.4 m	\$ 0.8 m	\$ 9.1 m
Tools and Utilities	\$ 0.9 m	\$ 0.4 m	\$ 0.6 m	\$ 0.4 m	\$ 0.3 m	\$ 1.4 m	\$ 0.6 m	\$ 0.8 m	\$ 0.4 m	\$ 6.2 m
Travel and Navigation	\$ 0.6 m	\$ 0.5 m	\$ 0.4 m	\$ -0.1 m	\$ 0.4 m	\$ 0.4 m	\$ 0.5 m	\$ 0.5 m	\$ 0.4 m	\$ 1.3 m
Weather	\$ 0.4 m	\$ 0.2 m	\$ 0.5 m	\$ 0.6 m	\$ 0.3 m	\$ 0.7 m	\$ 0.3 m	\$ 0.5 m	\$ 0.2 m	\$ 4.3 m



NOTE: Korea is excluded here as it is not iOS top 10 but Global Initiatives will apply to

Key Categories with \$3M+ gap and Countries aggregated key category gap of \$10M+



<http://www.counterpointresearch.com/applepulsenov2014>

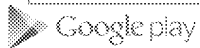
Key Categories with \$3M+ and Countries aggregated key category upside of \$10M+

Non-crossover markets: Where do China and Korea fit in?

Get category spend for Korea; eval opportunity and best areas of focus

Why are Apps not monetizing better on Play?

Factor	Categories/Regions Most Impacted
Not using IAB - Policy Exception	Music, Social, Entertainment, Books/Ref (JP Comics)
Not using IAB - Rev Share Barrier	Music, Entertainment (Video)
Limited Subscription Product Offering	News & Magazines, Music, Social, Sports, Fitness (subs)
Low FOP Penetration	LATAM, EMEA
Low ARPPU	General
Lack of BD Engagement	General
Poor Billing Product Implementation	General
Android User Socio-economic gap	General
iOS Penetration in Developed Markets	US, AU/NZ, UK, JP, KR*



*Apple records highest ever market share in Japan and Korea



Lack of BD Engagement

-- Some high revenue potential partners may not have previously had a Play partner manager; new vertical focus designed to identify these partners and maximize opportunity with them

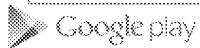
Poor Billing Product Implementation

-- Play needs to establish best practices for implementing IAB, Partners need to more consistently integrate IAB so it's easy for users to find and understand (this requires BD, DevRel, Marketing coordination)

*Apple records highest ever market share in Japan and Korea

What can we meaningfully address?

Factor	Categories/Regions Most Impacted	Stakeholders
Not using IAB - Policy Exception	Music, Social, Entertainment, Books/Ref (JP comics)	Policy/BD
Not using IAB - Rev Share Barrier	Music, Entertainment (Video)	Policy/BD
Limited Subscription Product Offering	News & Magazines, Music, Social, Sports, Fitness (subs)	Product
Low FOP Penetration	LATAM, EMEA	Marketing/BD
Low ARPPU	General	Marketing/BD
Lack of BD Engagement	General	BD
Poor Billing Product Implementation	General	BD/Mktg/DevRel
Android User Socio-economic gap	General	
iOS Penetration in Developed Markets	US, AU/NZ, UK, JP, KR	



Lack of BD Engagement

-- Some high revenue potential partners may not have previously had a Play partner manager; new vertical focus designed to identify these partners and maximize opportunity with them

Poor Billing Product Implementation

-- Play needs to establish best practices for implementing IAB, Partners need to more consistently integrate IAB so it's easy for users to find and understand (this requires BD, DevRel, Marketing coordination)

*Apple records highest ever market share in Japan and Korea



Variable Revenue Share

Reduce recurrence period rev share paid by devs (to 30 / 15 or 50 / 10) for a small number of strategic streaming music and video partners

Though small in number, these media developer segments will grow and represent significant strategic value for Play



Netflix



Hulu



HBO Go*



CBS



Deezer



Rdio



Rhapsody



Spotify



Estimated Financial Gain: ~\$20M - \$45M/year

PROPOSED CHANGE:

30% first month; 15% each recurrence

- Video & Music Content Partners Only:
~20M - \$45M/year*
- All Licensed Subscription Developers:
~12M - 25M/year

(more detail on model)

POLICY

*Modeled Music & Video Partners = Spotify, Deezer, Rhapsody, Rdio, Slacker, Crunchyroll, Hulu;
Including Netflix raises 'Net Gain' by \$27M/yr. for either scenario



Note: Play revenue from subscription IAB from 2012 through 2014 = \$46.5 M, where 2014 = 01 January 2014 through 02 December 2014)

Policy Change to Require Play Billing

Match Apple's policy requiring any developer offering digital goods for sale through Play to include Google Play Billing as a payment option.

- Should Play Billing be mandatory after FOP penetration is achieved in market?
- Should Play Billing be primary billing option?

Though this is a 'stick' approach, there is precedent for this kind of enforcement and it will bring some developers who are currently using our policy 'loopholes' on to the platform



LinkedIn



Match



Zoosk



Zinio



TripIt



Estimated Financial Gain: ~\$15M - 60M/year

- Examine top non-monetizing apps on Play
- Assume policy change brings them on platform.
- Model rev potential based on avg. iOS/Play consumer spend ratio

Rough Model

POLICY



Subscription Product Changes

For some high-revenue segments, offering alternative subscription products will increase revenue for those developers.


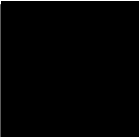


Music Apps - 1 week subscriptions account for as much as 85% of revenue on iOS for some partners

Dating & News Apps - 3 and 6 month subscriptions allow developers to offer more favorable pricing to consumers and are marketed heavily. These subs drive significantly more revenue than monthly subs offsetting any potential cannibalization to annual subscriptions.

Estimated Financial Gain:

Model based on data from partners using alternative subscription products on iOS.


- ██████████ monetizes 30x better on iOS; Weekly subscriptions contribute 85% of revenue share
- OkCupid sees 1% of iOS revenue from 3 and 6 month subscriptions, monetizing 3:1 iOS:Android

OKCupid Yokee Karaoke The Economist

PRODUCT

Google play



██████████ shared that iOS is monetizing 30x better for them than Android. They are anxious for Weekly subscription billing, which contributes 85% of their revenue on iOS. We hear the same from ██████████

██████████
; OKCupid says basically ██████████ || ██████████.

██████████
██████████
██████████

They are getting more detail about projected Android increase.

Case Studies

We need category-specific, regionally relevant case studies to showcase the benefit of 1.) integrating IAB and 2.) offering subscriptions instead of one-time purchases.

IAB Increases Conversion: IAP leads to increased conversion that off-sets the 30% tariff paid to Play. We need case studies in the Social and Music space.

Subscription Products vs. OTP: Subscriptions increase the LTV of a user. We need a case study from a developer who has added subscriptions to demonstrate.

Estimated Financial Gain:

Model by category to calculate revenue lift assuming top performing partners (iOS or current Play) integrate IAB and/or subscription products.

- *EX: NYT increased conversions by 125% following Play Billing integration. Apply similar % (w/Play spend ratio) to other News & Magazine partners*
- *Similar models for other categories like Dating, Productivity, Books & Ref using conversion rate and/or LTV increase*

MARKETING/BD



Education

Helping partners understand Play Billing advantages and best practices for implementation is critical to achieving greater penetration among top and mid-tier partners.

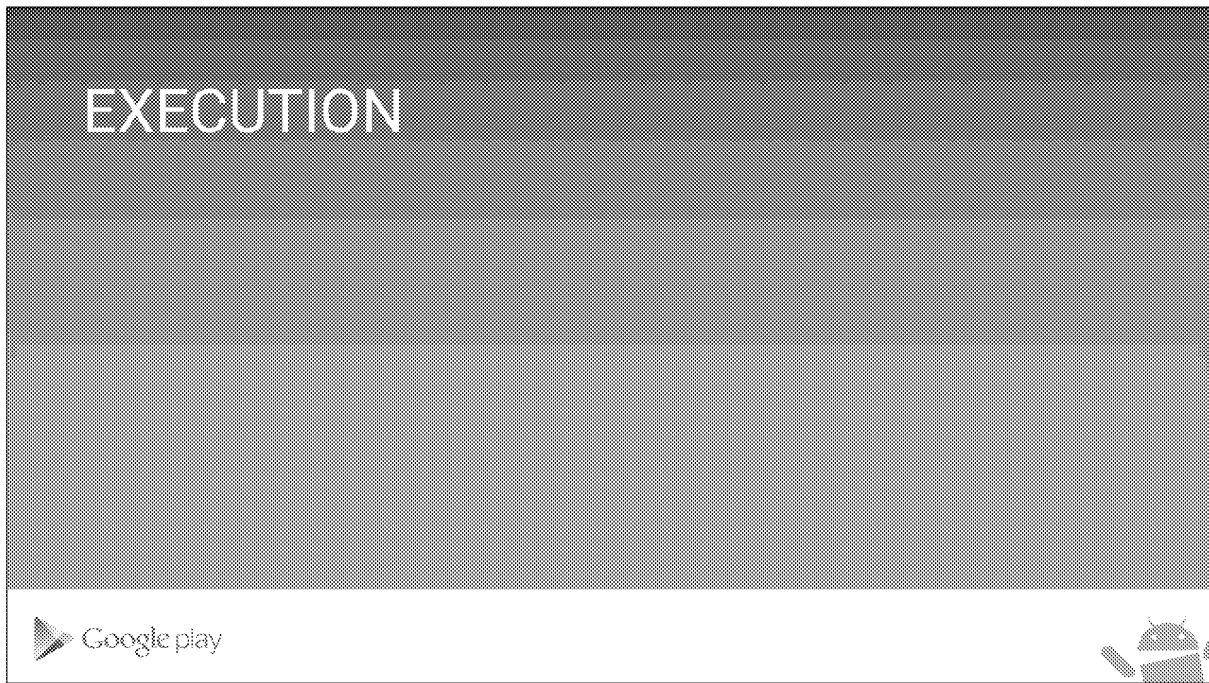
Playtime and Category-specific Events: Work to integrate IAB data, case studies and best practices into all relevant developer workshops to educate appropriate partners and facilitate Play Billing adoption.

Estimated Financial Gain:

TBD

MARKETING/BD/DEVREL





1H '15 Developer Facing Initiative Activities

Initiative	Stakeholders	1H'15 Activity (high-level)
Variable Revenue Share	Policy/BD	<ul style="list-style-type: none"> - Gain internal alignment on variable rev share model - Execute deals with pilot partners (1H '15)
IAB Policy Change	Policy/BD	<ul style="list-style-type: none"> - Analyze risk/benefit of policy change - If benefit+, determine appropriate IAB inclusion policy - Work with XFN teams to enact/enforce policy
Subscription Product Changes	Product/BD	<ul style="list-style-type: none"> - Identify revenue potential for 3 & 6-mo and discounted promo subs - Prioritize product development - EAP program for new products
Case Studies	Marketing/BD	<ul style="list-style-type: none"> - Identify highest value case studies (category & region) - Identify and gain partner commitments - Create and distribute 3 revenue-specific case studies
Partner Education	BD/Marketing/DevRel	<ul style="list-style-type: none"> - Integrate IAB best practices and case studies into all appropriate developer events; customize for category (ex. Media v. Music) and regional audiences

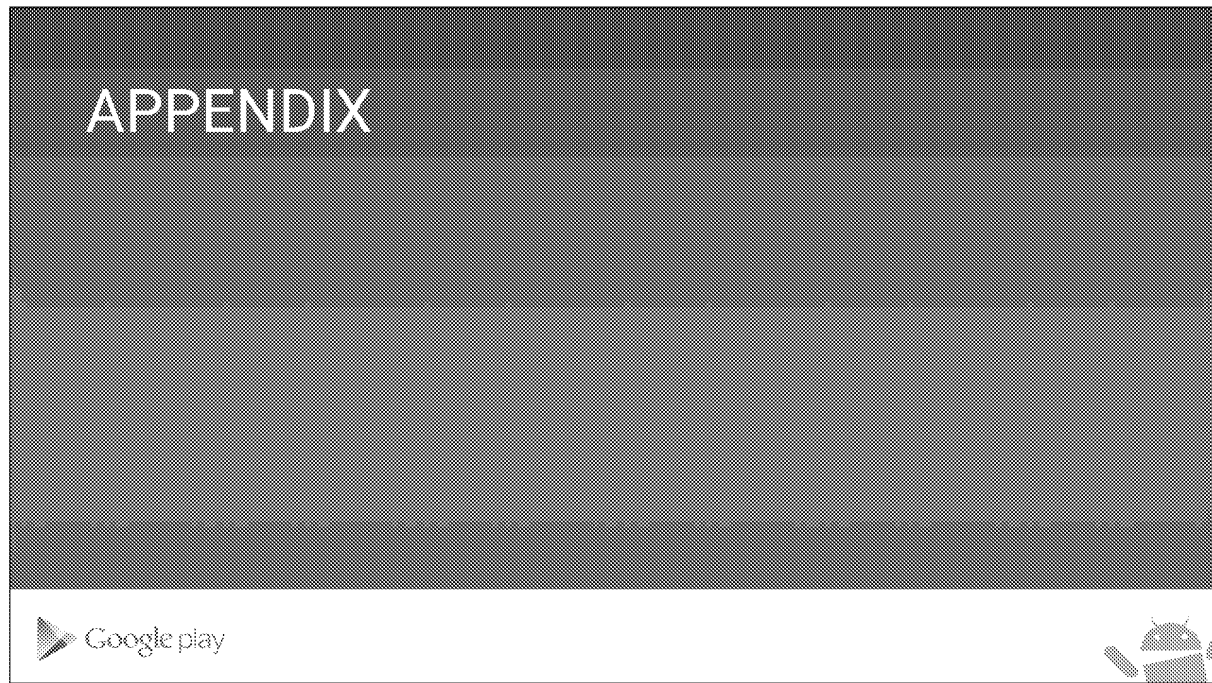


Next Steps

1. **Select highest potential revenue apps** by category by region (not all regions or categories may be included)
2. **Identify initiatives per partner/category** with greatest impact
3. **Assign BD/Marketing owners** for each revenue acceleration initiative (regional where appropriate, category-level where appropriate)
4. **Initiative owners work with XFN teams** (executive, stratops, policy, product, marketing, devrel) and partners to progress initiatives through 1H, piloting with selected partners
5. **Track progress** for selected partners, regions and categories against 2014 revenue

Tracking Doc (Perhaps we can track this in Jwaneng somehow?)





Developers Interpret Play's Policy Differently Than Apple's



App Store Guidelines Contain 17 Different Billing Rules

"11.2 Apps utilizing a system other than the In-App Purchase API (IAP) to purchase content, functionality, or services in an App will be rejected"

Example Subscription	Allowed	Purchase Type
Auto-Renewing Subscription to daily digital newspaper	✓	Auto-Renewable Subscription
Auto-Renewing Subscription to live TV streaming service	✓	Auto-Renewable Subscription

Apple's policy is absolute, which makes enforcement more manageable (esp. in the context of their protracted app review process)



Play Has Comparatively Fewer Billing Requirements

"Developers offering additional content, services or functionality within another category of app downloaded from Google Play must use Google Play's in-app billing service as the method of payment, **except**:

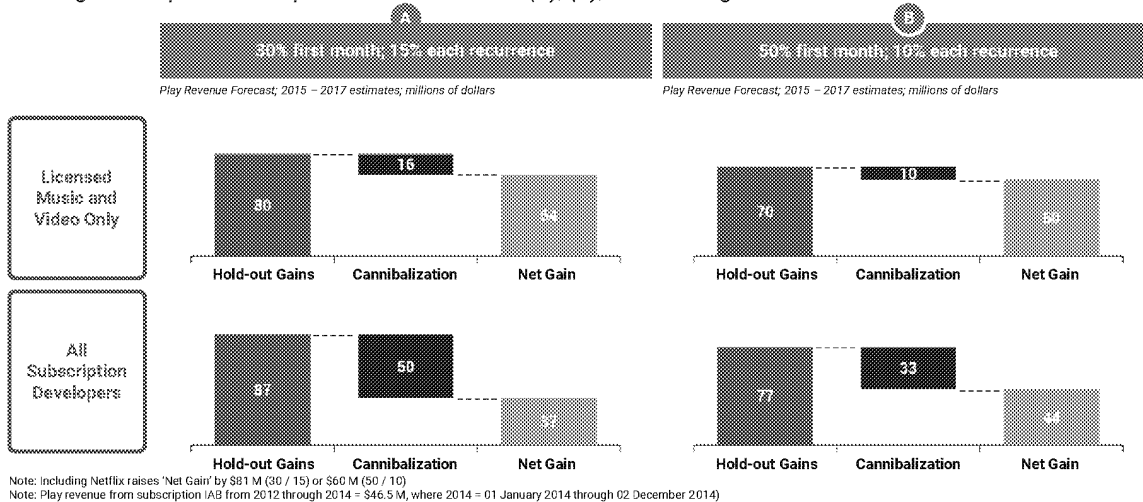
- where payment is primarily for physical goods or services (e.g., buying movie tickets, or buying a publication where the price also includes a hard copy subscription); or
- where payment is for digital content or goods that may be consumed outside of the app itself (e.g., buying songs that can be played on other music players)."

Play's policy is slightly more open, in particular for media developers offering streaming services across platforms - this makes enforcement more challenging



Estimated Financial Impact of Two Potential Rev Share Changes

We modeled two new scenarios for subscription IAB terms, and each was universal – that is, we did not consider offering subscription developers a choice between (A), (B), and existing terms



19

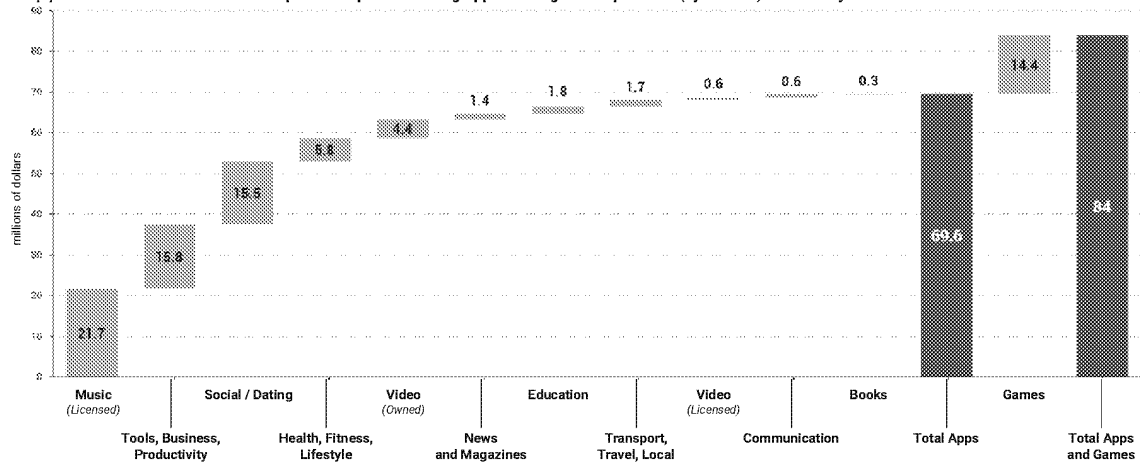
Hold-out Gains for 'Licensed Music and Video Only' section = Spotify, Deezer, Rhapsody, Rdio, Slacker, Crunchyroll, Hulu
 Hold-out Gains for 'All Subscription Developers' section = Spotify, Deezer, Rhapsody, Rdio, Slacker, Crunchyroll, Hulu, LinkedIn

And, adding in Netflix raises this by \$81 M (30 / 15) or \$60 M (50 / 10).

Consumer Spend: Top 100 Grossing Subscription Apps on Play

Play subscription IAP yielded approximately \$107 M in consumer spend in 2014*, most of which comes from apps

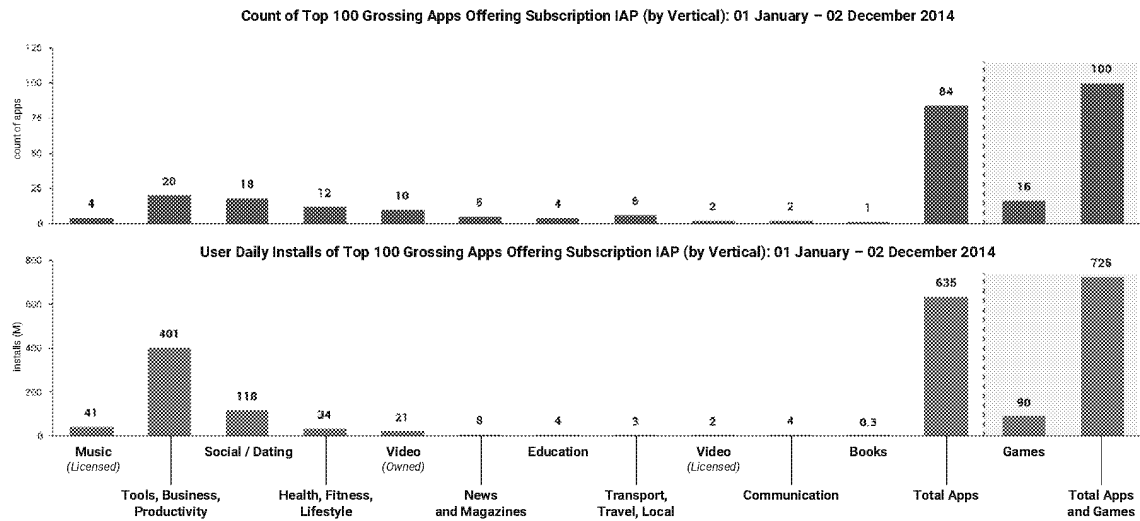
Consumer Spend in Top 100 Grossing Apps Offering Subscription IAP (by Vertical): 01 January – 02 December 2014



Note: * Data represent 2014 year-to-date developer revenues on Google Play (01 January 2014 through 02 December 2014).
Source: Play Analytics

20

App Counts and Installs: Top 100 Grossing Subscription Apps on Play



Note: * Data represent 2014 year-to-date developer revenues on Google Play (01 January 2014 through 02 December 2014).
Source: Play Analytics

Consumer Initiative: FOP Activation via Carrier Partnering

FOP-enabled user base is low in some regions. Partnering with carriers to promote Play *at the point of device sale* will be an effective way to grow user FOPs.

[SEA, LATAM]

Rebrand Play Gift Cards: Gift Card label does not resonate in many regions. Rebranding as Pre-Paid Cards and distributing at the point of device sale or data plan top up will increase Play awareness and on-board users. \$5 and \$10 pre-pay cards will be critical in emerging mkts.

Free Play Cards with phone purchase: Carriers have a direct incentive to increase FOP adoption and paying users (DCB revenue). Partner with Carriers to subsidize pre-pay cards.

Estimated Financial Gain:

- $\% \text{ FOP-enabled lift/country} * \text{Current Users} * \text{Avg. user spend}$

Ex: FOP increase of 5% * 10M current users * Avg spend of \$5/year/user = \$2.5M/yr.
[calculations are for example only]

MARKETING/BD



Sub \$99 test: Countries must have reasonable FOP penetration including DCB; Apps offered for sale must have broad audience; Promotion in regions should be prominent

Consumer Initiative: FOP Activation via Promo Pricing

In some markets, the \$.99 floor on app pricing is a barrier to enabling paying users. In select markets, for select high-po apps, pilot a sub-\$.99 promotion to increase FOP-adoption, Paying User % and ARPPU **[LATAM, EMEA]**

Gameloft Success Story: In conjunction with Gameloft, Play Games team conducted a short promotional event in selected regions.

<https://docs.google.com/document/d/1y3NXIVFG6s8GbhCMMaYeTG9ix4q763afI8zezuBrD1A/edit>

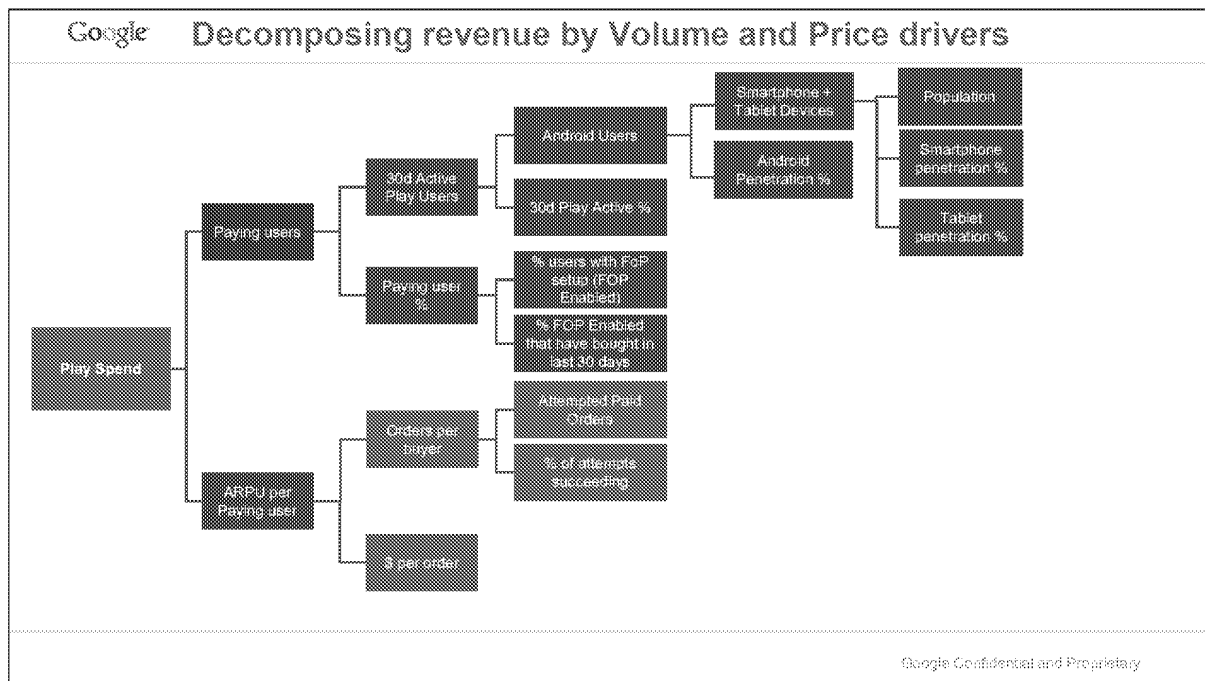
Estimated Financial Gain:

- $\% \text{ converted non-payers to payers} * \text{fop-enabled non-payers} * \text{Avg. paying user spend/yr}$
- $\text{New FOP-enabled users} * \text{avg. user spend/yr (by country)}$

MARKETING/BD



Sub \$99 test: Countries with reasonable FOP penetration including DCB perform better; Apps offered for sale must have broad audience; Promotion in regions should be prominent



Google Detailed driver analysis reveals specific areas to investigate									
	Consumer Spend	Paying Device %	% FOP Enabled	Play Home Active Device %	Android 100% Penetration %	Smartphone & Tablet Device per capita	Avg \$ per Paying Device	Orders per buyer	\$ per Order
APAC	\$1,661M	3%	11%	72%	26%	0.3	\$22.4	4.8	\$4.7
EMEA	\$592M	2%	13%	71%	28%	0.4	\$23.4	4.2	\$5.5
Americas	\$813M	3%	14%	75%	55%	0.7	\$31.5	3.8	\$8.2
JP	\$576M	3%	14%	70%	45%	0.7	\$31.5	3.8	\$8.2
KR	\$391M	5.3%	21%	75%	76%	1.0	\$39.1	4.0	\$9.8
US	\$717M	5.1%	20%	73%	37%	1.2	\$32.6	3.7	\$8.8
DE	\$124M	4.7%	25%	72%	49%	1.0	\$23.7	4.5	\$5.2
GB	\$102M	5.8%	31%	66%	37%	1.1	\$22.4	4.7	\$4.8
FR	\$77M	2.9%	14%	67%	42%	1.0	\$22.9	5.1	\$4.4
RU	\$36M	1.6%	8%	72%	64%	0.5	\$17.3	3.9	\$4.4
IT	\$32M	3.6%	25%	74%	50%	0.7	\$19.4	4.0	\$4.9
ES	\$22M	1.1%	16%	74%	43%	0.8	\$22.2	4.2	\$5.2
CH	\$15M	4.6%	25%	67%	73%	1.2	\$36.8	4.6	\$8.0
NL	\$13M	1.9%	18%	73%	66%	0.9	\$24.4	3.9	\$6.3
AT	\$13M	3.3%	19%	65%	50%	1.0	\$31.7	4.3	\$7.4
TR	\$13M	6.5%	25%	62%	55%	1.3	\$20.3	4.1	\$7.4
NO	\$11M	4.3%	31%	62%	40%	1.3	\$26.2	4.8	\$7.2
SE	\$11M	3.2%	24%	65%	38%	1.2	\$26.5	4.3	\$6.2
SA	\$8M	6.5%	25%	63%	59%	0.8	\$19.5	4.2	\$4.6
AE	\$8M	1.0%	7%	73%	47%	1.0	\$16.3	4.1	\$3.9
ZA	\$8M	1.0%	2%	64%	76%	1.4	\$16.2	3.7	\$6.5
BE	\$7M	4.1%	14%	66%	44%	0.6	\$26.7	4.2	\$6.6
DK	\$6M	3.7%	31%	65%	29%	0.6	\$26.4	3.8	\$6.9












Google Confidential and Proprietary

Refreshed data (21 Jan 15)

Top 20 Entertainment, Sports and News Apps on iOS

Top developer by 2014 spend	iOS	Play	Gap	#1 User Country (and its share)
Disney	\$ 22,929,050	\$ 631,422	2.68%	US-52%
Voltage	\$ 18,941,934	\$ 12,284,300	39.34%	Japan-52%
MLB	\$ 18,252,090	\$ 2,092,002	10.28%	US-89%
NY Times	\$ 16,597,197	\$ 686,603	3.97%	US-84%
Conde Nast	\$ 9,814,819	\$ 141,644	1.42%	US-56%
The Economist	\$ 8,587,596	\$ 345,844	3.87%	US-41%
MagazineCloner	\$ 8,494,451	\$ 6,181,864	42.12%	GB-16%
RCSMediaGroup	\$ 8,261,272	\$ 3,996	0.05%	IT-85%
Budge	\$ 7,965,514	\$ 0	0.00%	US-35%
Dow Jones	\$ 7,880,863	\$ 338,203	4.11%	US-83%
Zinio	\$ 7,862,583	\$ 0	0.00%	US-39%
Topps	\$ 7,468,015	\$ 850,021	10.22%	US-84%
Time Inc.	\$ 7,359,241	\$ 0	0.00%	US-78%
Outfit7	\$ 6,733,418	\$ 1,674,614	19.92%	US-19%
NFL	\$ 5,715,122	\$ 767,496	11.84%	US-67%
Telstra	\$ 5,638,603	\$ 1,568,815	21.77%	AU/NZ-99%
LINE	\$ 5,270,213	\$ 7,255,622	57.93%	Japan-100%
COLOPL	\$ 5,192,736	\$ 0	0.00%	Japan-100%
The Guardian	\$ 4,880,222	\$ 440,451	8.28%	GB-77%
Gruppo Editoriale L'Espresso	\$ 4,859,126	\$ 0	0.00%	IT-87%
Times Newspapers	\$ 4,846,577	\$ 2,754	0.06%	GB-74%
Google Play Store	\$ 4,828,516	\$ 0	0.00%	US-84%

Top 20 Communications, Social and Music Apps on iOS

Top Developers by 2014 spend	iOS	Play	Gap	#1 User Country (and its share)
LINE	\$ 121,226,730	\$ 133,308,364	52.37%	Japan-84%
Pandora	\$ 97,979,797	\$ 12,430,836	11.26%	US-99%
Zoosk	\$ 41,720,146	\$ 0	0.00%	US-49%
Skype	\$ 38,149,651	\$ 0	0.00%	US-37%
				
Badoo	\$ 25,590,232	\$ 3,241,205	11.24%	FR-15%
				
Grindr	\$ 18,977,026	\$ 0	0.00%	US-43%
Match.com	\$ 18,694,900	\$ 0	0.00%	US-58%
Deezer	\$ 18,195,952	\$ 0	0.00%	FR-44%
Diverse inc	\$ 14,031,925	\$ 1,964,083	12.28%	Japan-100%
Cocone	\$ 13,795,605	\$ 8,760,843	38.84%	Japan-98%
Viber Media	\$ 12,340,140	\$ 6,118,049	33.15%	US-26%
IK Multimedia	\$ 11,815,620	\$ 157,081	1.31%	US-80%
GEB AdoptAGuy	\$ 11,644,492	\$ 2,884,579	19.85%	FR-94%
OkCupid	\$ 11,636,563	\$ 4,941,233	29.81%	US-82%
Ultimate Guitar	\$ 11,369,583	\$ 2,210,017	16.27%	US-46%
Rdio	\$ 10,717,215	\$ 0	0.00%	US-49%
PlentyOfFish	\$ 10,076,634	\$ 0	0.00%	US-56%
	\$ 9,760,530	\$ 777,167	7.38%	US-59%
LOVOO	\$ 9,546,474	\$ 5,720,627	37.47%	DE-50%

Top 20 Lifestyle Apps on iOS

Top app franchises by 2014 spend	iOS	Play	Gap	#1 User Country (and its share)
Sygic	\$ 47,451,953	\$ 1,911,091	3.87%	MENA-80%
Garmin	\$ 46,804,335	\$ 10,546,797	18.39%	DE-10%
TomTom	\$ 37,235,236	\$ 10,714,524	22.35%	GB-10%
NNG	\$ 17,973,549	\$ 399,448	2.17%	MENA-80%
Navionics	\$ 17,450,871	\$ 11,887,506	40.52%	US-14%
MagazineCloner	\$ 14,599,950	\$ 137,338	0.93%	GB-13%
Hearst	\$ 14,069,104	\$ 1,156	0.01%	US-33%
MedHand	\$ 13,306,206	\$ 3,297,770	19.86%	MENA-13%
ALK Technologies	\$ 12,898,721	\$ 8,264,444	39.05%	GB-10%
Runtastic	\$ 12,267,053	\$ 4,763,023	27.97%	DE-15%
City App	\$ 9,681,716	\$ 0	0.00%	MENA-90%
Elsevier Inc	\$ 9,635,047	\$ 428,589	4.26%	MENA-80%
Conde Nast	\$ 9,324,897	\$ 2,362	0.03%	US-27%
Inkling Systems	\$ 9,288,296	\$ 0	0.00%	MENA-70%
3D4Medical	\$ 8,947,311	\$ 510,620	5.40%	US-11%
Plus Sports	\$ 8,662,886	\$ 148,144	1.68%	US-19%
Future PLC	\$ 8,460,107	\$ 0	0.00%	GB-18%
Coyote System	\$ 8,019,376	\$ 62,544	0.77%	FR-81%
XROAD, INC.	\$ 7,179,816	\$ 0	0.00%	MENA-40%
Creston Electronics	\$ 6,700,987	\$ 1,449,511	17.78%	US-28%
Svenska Resenatverket	\$ 6,151,825	\$ 2,382,708	27.92%	GB-17%

Top 20 Utilities and Enterprise Apps on iOS

Top Developers by 2014 spend	iOS	Play	Gap	#1 User Country (and its share)
LINE	\$ 20,254,381	\$ 16,910,313	45.50%	Japan-94%
Microsoft	\$ 18,413,968	\$ 1,009	0.01%	US-43%
Readdle	\$ 15,449,488	\$ 0	0.00%	US-31%
Toca Boca	\$ 15,084,663	\$ 1,131,610	6.98%	US-34%
LogMeIn	\$ 14,341,288	\$ 99,471	0.69%	MENA-7%
Disney	\$ 14,088,518	\$ 799,671	5.37%	US-33%
Oceanhouse Media	\$ 12,327,983	\$ 2,016,403	14.06%	US-10%
MobiSystems	\$ 11,934,433	\$ 10,338,263	46.42%	MENA-6%
Dropbox	\$ 11,768,376	\$ 1,684,173	12.52%	US-45%
SHUEISHA	\$ 11,042,351	\$ 2,002,554	15.35%	Japan-10%
Lesson Nine	\$ 10,953,802	\$ 2,935,877	21.14%	DE-23%
Paragon Software	\$ 10,407,798	\$ 2,367,668	18.53%	MENA-5%
ForeFlight	\$ 10,356,944	\$ 0	0.00%	US-90%
DIGI117	\$ 10,010,463	\$ 148,817	1.46%	MENA-13%
AgileBits	\$ 9,794,599	\$ 160,476	1.61%	US-31%
Nickelodeon	\$ 9,460,822	\$ 433,567	4.38%	US-62%
Evernote	\$ 9,232,228	\$ 2,319,148	20.08%	US-44%
Intuit	\$ 9,145,328	\$ 813,776	8.17%	US-99%
Marvel	\$ 9,053,100	\$ 2,716,741	23.08%	US-61%
Appxy	\$ 8,928,579	\$ 401,810	4.31%	US-35%
Kinokuniya	\$ 8,821,939	\$ 0	0.00%	Japan-100%

Google Play



Highest Potential Regions by Category Gap %

	AU/NZ	Brazil	CA	DE	FR	GB	IT	Japan	RU	US
Books and Reference	19%	10%	13%	25%	14%	14%	14%	26%	8%	10%
Business	19%	10%	14%	21%	14%	12%	15%	16%	12%	20%
Catalogs and Shopping	15%	4%	7%	22%	5%	10%	9%	5%	7%	17%
Communication and Social	13%	19%	17%	43%	20%	15%	31%	38%	19%	19%
Education	14%	14%	12%	25%	19%	13%	19%	21%	13%	8%
Entertainment	14%	14%	11%	18%	23%	20%	18%	35%	4%	9%
Finance	22%	11%	9%	18%	7%	9%	10%	10%	9%	12%
Health and Fitness	20%	19%	16%	34%	21%	20%	21%	20%	13%	13%
Lifestyle	9%	6%	9%	14%	11%	9%	7%	7%	7%	8%
Medical	23%	11%	10%	19%	14%	13%	10%	8%	5%	14%
Music and Audio	12%	7%	11%	16%	8%	9%	12%	20%	18%	11%
Navigation and Transportation	8%	4%	4%	7%	3%	5%	6%	25%	6%	6%
News and Magazines	10%	6%	4%	10%	4%	7%	2%	13%	6%	4%
Photo, Video and Media	20%	14%	15%	30%	18%	18%	17%	41%	17%	13%
Productivity	17%	17%	13%	24%	17%	13%	19%	28%	17%	11%
Sports	17%	5%	13%	19%	13%	7%	10%	15%	7%	17%
Tools and Utilities	28%	32%	28%	41%	35%	26%	28%	45%	35%	24%
Travel and Navigation	37%	20%	26%	51%	33%	39%	29%	25%	36%	31%
Weather	32%	9%	7%	23%	14%	9%	16%	18%	16%	8%

Google play

<http://www.counterpointresearch.com/applepulsenov2014>

Only 9% of people who attempt to purchase on Play actually complete the purchase; better purchase flows are in the works
Abandonment happens for a variety of reasons; non-FOP-enablement is a big contributor

Exhibit A22

Public Redacted Version

EXHIBIT 9

Message

From: Sameer Samat [ssamat@google.com]
Sent: 1/17/2017 5:05:38 PM
To: Kirsten Rasanen [krasanen@google.com]
CC: Brandon Barras [bbarras@google.com]; Larissa Fontaine [larissa@google.com]; Tia Arzu [tiaa@google.com]; Paul Feng 馮友樸 [pfeng@google.com]; Jamie Rosenberg [jamiero@google.com]; Purnima Kochikar [kochikar@google.com]; Mary Oh [maryoh@google.com]; Larry Yang [lryang@google.com]
Subject: Re: Tinder and Google Play Billing [Concern]

Your point about dating being a category where it is unlikely you'll have year + long subscriptions is compelling to me.

Matching funds makes sense to me -- what can people use these for? Is it like giving them credit for Adwords?

I still find the 15% number kind of random. I understand what Paul is saying that Apple set a benchmark, but it seems like a gigantic decision and justifying such a huge business model impacting number (for the developer too!) with "apple did it" feels bad to me.

It seems like there is urgency to do something here. What are you guys proposing now based on this thread ?

sameer

On Thu, Jan 12, 2017 at 10:06 AM, Kirsten Rasanen <krasanen@google.com> wrote:

Thanks, Sameer. It is a complicated issue and agree that there are many ways we can achieve the same end. Just want to offer a couple of nuances regarding the dating category that may be helpful context.

1. It's true that Apple's model is 30% for year one and 15% thereafter, but that's not super enticing for dating apps. Since the traditional goal of these services has been to help users find a mate, subscription terms for longer than one year are not very common. From the user perspective, if Match.com doesn't work for me in 12 months, I'm probably going to try another service. If it does work for me, I'm going to unsubscribe. (Duly noted that Tinder is changing that a bit as the goal isn't necessarily the same for a Tinder user...)
2. The larger (most profitable) services like Match, Zoosk and eHarmony, began as web businesses (10 - 20 years ago) and are actually quite sophisticated in terms of churn-reduction, reengagement and buyer conversion. In some ways our billing platform is not as good as theirs currently are. These three are primarily US-based. Services like Tinder and Plenty of Fish do have global ambitions which makes GPB more attractive, though for legacy businesses (like POF), they tell us 30% rev share is still prohibitive for exclusive adoption.

Finally, on the idea of co-marketing, we are thinking about ways that we can potentially offer marketing funds to Tinder as part of a broader co-marketing initiative. This would be a way to mitigate the risk of Tinder diversifying payment methods, but it's unlikely that co-marketing funds will bring services like Match or Zoosk on to GPB unless we are willing to make a huge investment (\$10M+ to offset 30% rev share) which doesn't seem likely.

All said, this certainly merits additional consideration. BD and product (Paul, Larry, Larissa and others) are engaged in on-going discussions about billing policy, platform and incentives.

Thanks,
 Kirsten

On Thu, Jan 12, 2017 at 8:51 AM, Sameer Samat <ssamat@google.com> wrote:

An alternative to dropping the rev share here could be a one time commitment to go-marketing funds for 2017 to help drive growth in exchange for them getting onto play billing. This would cost us quite a bit in 2017 but

**Exhibit
 PX 1437**

could make us more money in the medium term. Once we go to 15% right off the bat there is no coming back and it puts pressure for us to do the same on other verticals.

ios's billing isn't 15% in the first year -- it's 30% then 15%, yes? Do we need to go right to 15% here? I think a longer term view here might be helpful -- I think the product team and bd should sit down and think this through a bit. For example, if we put in place a promotions and loyalty system that developers can implement in their app to help subscription based services retain and reengagement consumers across ad networks and via play store / play marketing channels we could do something clever in the future and say:

It's 30% for subs in year 1. But 50% of that we hold in an account for you to use our promotion systems to retain subs -- our goal is to help you build a long term business with loyal users. Any sub that makes it to the 1 year renewal point billing drops to 15%.

If we go to 15% right now in year 1 there is no way to go back and implement these kinds of things so it is really important to think through where we want to go.

Also, you mentioned in your summary Brandon "undetermined platform value". Are these dating companies all in the US? Do they have plans to go international? Does our billing perform worse for all of them? I have some trouble believing that because a lot these companies are smaller and unlikely to have developed sophisticated declines / involuntary churn efforts. Although I could be surprised by how bad we are at this perhaps.

Also, PaulF: I think all this 30%, 15% stuff is pretty arbitrary. The cost should be a function of the LTV and cost of acquisition in the category. Not to make things too complicated, but in the retail world Amazon marketplace charges a variable rate per category based on the underlying margin and cost structure of those goods. It shows respect for the partners business to understand things at this level -- and provides flexibility to be able to adjust as needed. In the case of Play the reality is each partner would likely just have one rate they'd need to deal with (vs. retailers who sell across categories quite often). Any thoughts on this ?

On Thu, Jan 12, 2017 at 7:16 AM, Brandon Barras <bbarras@google.com> wrote:

Per Larissa's note, we have thought about how we might extend LRAP-like rev share terms to dating partners. While there are not as many logical product integrations (i.e. dating apps on ATV or in Auto don't make a lot of sense), there is still opportunity for partners to increase investment in the platform in exchange for increased rev share from Play.

Goal

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Thanks,
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||| **Tia Arzu**
||| Senior Counsel, Google Inc
Registered In-House Counsel
(CA), Licensed only in Georgia
650-214-1908



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Jamie and Sameer, would it be useful to discuss this in person? Happy to work with Elyse and Erin to schedule something for next week or the first week in January.

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krasanen@google.com | [646-345-8662](tel:646-345-8662)

Exhibit A23

Public Redacted Version

EXHIBIT 11

Message

From: Kirsten Rasanen [krasanen@google.com]
Sent: 1/12/2017 6:06:09 PM
To: Sameer Samat [ssamat@google.com]
CC: Brandon Barras [bbarras@google.com]; Larissa Fontaine [larissa@google.com]; Tia Arzu [tiaa@google.com]; Paul Feng 馮友樸 [pfeng@google.com]; Jamie Rosenberg [jamiero@google.com]; Purnima Kochikar [kochikar@google.com]; Mary Oh [maryoh@google.com]; Larry Yang [lryang@google.com]
Subject: Re: Tinder and Google Play Billing [Concern]

Thanks, Sameer. It is a complicated issue and agree that there are many ways we can achieve the same end. Just want to offer a couple of nuances regarding the dating category that may be helpful context.

1. It's true that Apple's model is 30% for year one and 15% thereafter, but that's not super enticing for dating apps. Since the traditional goal of these services has been to help users find a mate, subscription terms for longer than one year are not very common. From the user perspective, if Match.com doesn't work for me in 12 months, I'm probably going to try another service. If it does work for me, I'm going to unsubscribe. (Duly noted that Tinder is changing that a bit as the goal isn't necessarily the same for a Tinder user...)
2. The larger (most profitable) services like Match, Zoosk and eHarmony, began as web businesses (10 - 20 years ago) and are actually quite sophisticated in terms of churn-reduction, reengagement and buyer conversion. In some ways our billing platform is not as good as theirs currently are. These three are primarily US-based. Services like Tinder and Plenty of Fish do have global ambitions which makes GPB more attractive, though for legacy businesses (like POF), they tell us 30% rev share is still prohibitive for exclusive adoption.

Finally, on the idea of co-marketing, we are thinking about ways that we can potentially offer marketing funds to Tinder as part of a broader co-marketing initiative. This would be a way to mitigate the risk of Tinder diversifying payment methods, but it's unlikely that co-marketing funds will bring services like Match or Zoosk on to GPB unless we are willing to make a huge investment (\$10M+ to offset 30% rev share) which doesn't seem likely.

All said, this certainly merits additional consideration. BD and product (Paul, Larry, Larissa and others) are engaged in on-going discussions about billing policy, platform and incentives.

Thanks,
 Kirsten

On Thu, Jan 12, 2017 at 8:51 AM, Sameer Samat <ssamat@google.com> wrote:

An alternative to dropping the rev share here could be a one time commitment to go-marketing funds for 2017 to help drive growth in exchange for them getting onto play billing. This would cost us quite a bit in 2017 but could make us more money in the medium term. Once we go to 15% right off the bat there is no coming back and it puts pressure for us to do the same on other verticals.

ios's billing isn't 15% in the first year -- it's 30% then 15%, yes? Do we need to go right to 15% here? I think a longer term view here might be helpful -- I think the product team and bd should sit down and think this through a bit. For example, if we put in place a promotions and loyalty system that developers can implement in their app to help subscription based services retain and reengagement consumers across ad networks and via play store / play marketing channels we could do something clever in the future and say:

It's 30% for subs in year 1. But 50% of that we hold in an account for you to use our promotion systems to retain subs -- our goal is to help you build a long term business with loyal users. Any sub that makes it to the 1 year renewal point billing drops to 15%.

If we go to 15% right now in year 1 there is no way to go back and implement these kinds of things so it is really important to think through where we want to go.

**Exhibit
 2682**

Also, you mentioned in your summary Brandon "undetermined platform value". Are these dating companies all in the US? Do they have plans to go international? Does our billing perform worse for all of them? I have some trouble believing that because a lot these companies are smaller and unlikely to have developed sophisticated declines / involuntary churn efforts. Although I could be surprised by how bad we are at this perhaps.

Also, PaulF: I think all this 30%, 15% stuff is pretty arbitrary. The cost should be a function of the LTV and cost of acquisition in the category. Not to make things too complicated, but in the retail world Amazon marketplace charges a variable rate per category based on the underlying margin and cost structure of those goods. It shows respect for the partners business to understand things at this level -- and provides flexibility to be able to adjust as needed. In the case of Play the reality is each partner would likely just have one rate they'd need to deal with (vs. retailers who sell across categories quite often). Any thoughts on this ?

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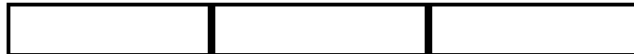
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